Manor
Independent School District

MANOR INDEPENDENT SCHOOL DISTRICT

LEGISLATIVE BUDGET BOARD

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Mr. Andrew Kim
Superintendent
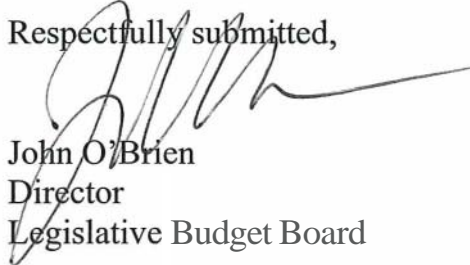Manor Independent School District

Dear Mr. Kim:

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

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

The Legislative Budget Board engaged McConnell Jones Lanier & Murphy LLP to conduct and produce this review, with LBB staff working in a contract oversight role.

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

Respectfully submitted,

John O'Brien
Director
Legislative Budget Board

cc: Ms. Desiree Cornelius-Fisher
Mr. Ben Arellano
Mr. John Jonse
Mr. Matildy Samaripa, Jr.
Mr. Daniel Turpin
Mr. Mike Thomas
Mr. Johnny Velasco

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EXECUTIVE SUMMARY

Manor Independent School District's (MISD's) school performance review notes 31 commendable practices and makes 76 recommendations for improvement. This Executive Summary highlights the district's significant accomplishments and recommendations. A copy of the full report is available at www.lbb.state.tx.us.

SIGNIFICANT ACCOMPLISHMENTS

- MISD is implementing a three-year school-based mentoring grant, Project Mentor, to assist students academically and provide them with friendship, encouragement, and a positive role model. Although Project Mentor is designed to target students in grades 4 through 8, the district has matched mentors to students from Kindergarten to grade 11. In 2008–09, MISD had 124 mentors, with plans to have more than 200 mentors in 2009–10. Mentors participating in the Project Mentor program go to the school of their respective student once a week during lunchtime or after school for a minimum of 45 minutes. During their time together, mentors and students can engage in a wide range of activities such as reading a book, completing homework, discussing managing time effectively, conducting research on the Internet, talking about what happened during the day, or working to develop effective study habits. Mentors keep a portfolio of their mentoring contacts and activities and log their contact with the student and record observations of what is working, challenges and concerns, and the mentor's and teacher's next steps.

- The MISD Student and Family Support Services Department fills the gap in availability of support services in the Manor community to help students and their families. The department provides services to students with attendance problems; mental health and behavioral issues; medical and dental problems; hygiene issues; pregnancy and parenting needs; abuse, neglect, and violence issues; and clothing, food, and housing needs. Among the programs and strategies used by the department to meet the needs of students and their families are: the Annual Resource Fair/School Supply Distribution Day, which is held before the start of the school year, at which time bags of school supplies are distributed to needy students; an annual Coat and Shoe Distribution event, which distributed 300 new pairs of shoes and 200 new coats in 2008, purchased through $20,000 in donations from local businesses; and daytime and evening literacy, English as a Second Language (ESL), and General Education Development (GED) classes offered free of charge to district parents.

- MISD has established multiple instructional accountability tools at the district and campus level to monitor and improve instruction. These tools include Checkpoints, Learning Through Instructional Reflection (LIR), and Instructional Leadership Team (ILT) meetings. The purpose of the Checkpoints system is to ensure that principals and teachers analyze their students' six-week assessment results; address areas of academic weakness identified through these assessments; and are effectively meeting the academic needs of their students. Instructional Leadership Team (ILT) meetings are another strategy that MISD has implemented to share information about instructional issues districtwide. ILT meetings are held monthly at different schools and provide a venue through which principals receive and deliver professional development on specific topics, and team members conduct walkthroughs on the respective campuses. The purpose of the walkthroughs is to focus on positive classroom observations such as quality instruction and successful classroom management as well as identify areas of concern. LIR has proven to be an effective way to identify districtwide classroom instruction problems.

- Manor New Tech High School (MNTHS), a Texas Science, Technology, Engineering, and Math (T-STEM) academy, has achieved success with its technology integrated, project-based instructional approach. The MNTHS curriculum, based on the state's learning standards, the Texas Essential Knowledge and Skills (TEKS), brings together technology, problem solving, interdisciplinary instruction, and community and business partnerships. MNTHS offers students hands-on

collaborative learning in a small learning community, as students work individually and in small groups in the project-based learning environment. Desktop and laptop computers are available to students in every class, resulting in a student-to-computer ratio of 1:1. Technology is seamlessly integrated into all subject areas at MNTHS. Instructional technology tools available include iPods, digital and high definition cameras, video editing software, interactive whiteboards, and projectors. The school has a central media room where students and teachers can present their projects. Students present their projects to other students, teachers, and panels of community experts. Student work is maintained in digital portfolios throughout their high school career.

- MISD's effective utilization of E-Rate and bond funding has resulted in the implementation of a robust computing and network infrastructure that will adequately support the district's current and future technology needs. MISD actively participates in the E-Rate program governed by the Universal Services Administration Company's School and Library Division to enhance its network and telecommunications infrastructure. Additionally, the district has received support for improving its technology from the Manor community through the approval of bond funds dedicated to this purpose. As a result, in recent years the district has been able to implement a computing and networking infrastructure that will support the district's technology needs for years to come. The main features of the enhanced infrastructure include fiber-optic network connectivity for expanded Internet access, wireless connectivity throughout the district, Voice over Internet Protocol (VoIP) telecommunications, and video security at secondary campuses. The district's network was upgraded to a 20MB Internet connection, and each campus has a dedicated private or leased fiber connection.

- MISD developed a comprehensive, long-range facilities plan in August 1999 that has guided the district through multiple successful capital improvement programs. Since 1992, the district has contracted with an educational facility planning and construction program management firm to assist with the district's long-range facilities planning and capital improvement programs, including development of

the plan. This plan proactively prepared Manor for the district's rapid growth. The general process used for developing the plan included evaluating the district's needs, involving community stakeholders, building consensus, and disseminating materials regarding the capital improvement/bond programs so that informed decisions could be made. MISD's comprehensive, long-range facilities plan ensures proper coordination of the district's facilities and educational programs; community expansion plans; building costs and capital requirements; and design guidelines.

- Food Service uses 100 percent of the United States Department of Agriculture (USDA) commodities provided by the National School Lunch Program. The USDA provides commodities to school districts as a means of lowering food costs. The amount of USDA commodities that are available to schools depends upon the percentage of economically disadvantaged students enrolled and the district's previous commodity usage. Many school districts either do not use available USDA commodities, or use very little. To enable the most use of commodity entitlement dollars, MISD diverts a large portion of their commodities to food processors. The district also participates in the Farm to School Program that enables the district to use commodity entitlement dollars for fresh fruits and vegetables. MISD is able to use all of their commodities due to the emphasis that the Food Service director places on commodity usage and menu planning around available commodities.

SIGNIFICANT RECOMMENDATIONS

DISTRICT PLANNING AND ORGANIZATION

- **Develop a comprehensive strategic plan that links the district's goals and objectives to the budget.** MISD does not have a comprehensive strategic plan to effectively manage the affairs of the district. MISD uses its district improvement plan (DIP) as a substitute for a comprehensive strategic plan. The DIP is focused on instruction and includes student achievement, fiscal responsibility, community involvement, personnel, and safety as they relate to the delivery of educational services. The DIP does not address transportation, food service, asset and risk management, and other areas of district operations. As a result, planning for items such as non-instructional

personnel, growth, and risk management is addressed in ancillary documents that are not integrated into a single comprehensive strategic plan, and board and administration driven goals and objectives do not address these areas. Additionally, while the DIP lists the funding sources to be used under the "Resources" section of the DIP, there is no direct link to the district's budget in this document. The District Advisory Team should be tasked with outlining the goals and objectives for all of the district's operations, identifying all resources required to accomplish the goals, forecasting the dates for completion, and selecting the staff within the district responsible for achieving the goals within the established timelines. The strategic plan should include performance measures for each goal and objective, and the plan should serve as the basis for the operations of the district and help guide the board when evaluating the superintendent and allocating resources.

- **Develop a coordinated district community involvement plan.** MISD's community involvement program, according to the superintendent, is in its infancy. Its major existing component revolves around the support services the district provides through the Student and Family Support Services Department. Campus community involvement activities are implemented and managed at each campus individually with little or no coordination among campuses or guidance and monitoring at the district level. The success and effectiveness of the community involvement activities vary from campus to campus based on each principal's interest and involvement, and on the initiative and dedication of parents. While MISD has begun to initiate some districtwide parent and community involvement activities, it has done so without an overarching vision, district-level coordination, articulated priorities, a timetable, or a formal mechanism for planning and organizing these activities. A coordinated plan will bring focus and structure to community involvement activities, and is critical for the district as it embarks on expanding its community involvement initiatives. The plan should address the coordination of the different programs at the district-level and specify strategies for assisting and supporting campus community involvement efforts. The plan should align with the community involvement goal and strategies that are found in the 2008–09 district improvement plan.

- **Update the Long-Range Technology Plan for 2008–11 to include all the components necessary to make it a comprehensive and effective management tool.** MISD's Long-Range Technology Plan is neither comprehensive nor linked to the district improvement plan (DIP). MISD has developed a Long-Range Technology Plan for 2008–11 to accomplish its technology goals. The Technology Plan was developed by the district's Technology Plan Committee, which is comprised of ITS Department staff, teachers, students, and the members of the community. The plan focuses on guiding technology decisions by defining goals, objectives, strategies, activities, and timelines, and assigns responsibilities and costs to accomplish each goal. While the plan lays out a good roadmap for addressing instructional technology needs, instructional technology applications used throughout the district have not been reviewed by staff for effectiveness. In addition, regarding technology integration, the plan does not address how MISD will achieve the state's recommended student-to-computer ratio of 1:1 by 2010, the migration of technology at MNTHS to other campuses, or completion of bringing equity to the technology infrastructures of all campuses in the district. Without a comprehensive technology plan linked to the DIP, the district could be making decisions to spend resources other than where they are needed the most. The next update to the Long-Range Technology Plan should include: reviewing the DIP to determine how technology can support accomplishment of its defined goals and strategies; performing a formal needs assessment of the district's administrative and operational systems for upgrade or replacement requirements, including those used by the Business, Transportation, and Food Service Departments; reviewing the infrastructure upgrades required to bring all campuses in the district up to the same level; reviewing instructional technology applications used throughout the district for effectiveness; and expanding the Technology Plan Committee and requiring it to meet twice annually.

- **Consider revising the administrative organization structure to ensure a balance of responsibilities among district leaders.** The MISD superintendent assumes too much managerial responsibility related to the day-to-day operations of the district. The superintendent is the former deputy superintendent of Curriculum and Instruction. In addition to assuming

the chief leadership role for the district when he was hired to fill the superintendent position in July 2008, the superintendent has retained all the previous responsibilities he had as deputy superintendent. The demands of the superintendent do not adequately provide time to directly supervise the diversity and number of his current employee reports. As the district's growth stabilizes and the superintendent becomes more confident in the skills of the leadership team, revision of the organizational structure will narrow his span of control, allowing him to effectively delegate his current workload and providing him more time to focus on the critical issues related to district oversight. As part of the revision process, the district should consider reporting relationships, including the number of employees each manager supervises, and take into account the skills, management styles, and statutory responsibilities involved.

EDUCATIONAL SERVICES

- **Fully develop, monitor, review, and update the curriculum for all subject areas and grade levels based on a revised district curriculum management plan.** The Manor Curriculum Alignment Plan (MCAPS), is not fully and consistently developed, does not cover all subject areas, is not user friendly, and is difficult to update or revise. MCAPS was implemented in January 2006, and addresses the four core subject areas in elementary and secondary grades. MISD does not have curriculum guides for Music, Art, Health, and Physical Education but plans to develop guides in these areas in 2009–10 using Leadership in Educational Excellence Program (LEEP) teachers and Curriculum and Instruction Department staff. MCAPS also does not address or integrate the Technology Applications TEKS, the ESL/English Language Proficiency Standards, or Advanced Placement (AP)/Pre-Advanced Placement (Pre-AP) and Gifted and Talented Advanced Learners (GTAL) extensions. MISD principals, teachers, and Curriculum and Instruction Department staff agreed that MCAPS is not user friendly. Some teachers indicated that the MCAPS scope and sequence leads to over-teaching or under-teaching of some concepts. Not having a fully developed curriculum is particularly challenging for new and less experienced teachers, who constitute a high percentage of MISD teachers. The revised MCAPS plan should delineate

the curriculum development and updating process; define criteria for screening and reviewing suggestions for curriculum modifications; develop a methodology for translating suggestions into actual additions and modifications; specify the qualifications, such as content knowledge and experience, of teachers invited to help revise the curriculum; implement a training program for teachers participating in curriculum revision; delineate a quality assurance process for curriculum development and modifications; and set a timeline for curriculum updating by subject area and grade level. The total five-year cost to the district to use teacher-teams for these curricular efforts is $72,000.

- **Expand access to technology and integrate technology into the curriculum and instruction districtwide.** Technology is not integrated into the MISD curriculum or into classroom instruction districtwide. The district's MCAPS curriculum does not integrate technology as a resource or as part of teaching strategies and activities, and it does not link the Technology Applications TEKS to student expectations. Technology use is not consistent across schools. According to administrators and teachers, the lack of consistency is due to several factors including inequities in the volume and new technology available, with more recently opened schools having more technology and more up-to-date technology. According to district instructional specialists, few elementary school teachers use technology in the classroom. Technology integration at the secondary level varies by subject area; it is more integrated in science or in advanced classes. Also, the district does not make optimal use of the technology it already has available. Although the 2008–09 MISD district improvement plan addresses technology, the integration of technology in instruction is not one of the district goals and is only addressed through three broad strategies. The integration of technology into instruction is addressed in a limited way in the 2008–09 MISD campus improvement plans (CIPs), and none of the CIPs identify the need for technology training and technology integration training for teachers, staff, and administrators. MISD should recognize technology use and integration as a district priority and articulate such in its Long-Range Technology Plan and the district and campus improvement plans. The district should create mechanisms to support

technology integration such as the establishment of a Technology User Group and a teacher technologist program, and encourage its teachers and students to use innovative technologies in daily classroom activities. MISD should incorporate the Technology Applications and technology resources into MCAPS and increase access to technology. The district should develop teacher technology competencies, adopt technology usage standards, and conduct a technology skills/competencies assessment of administrators, teachers, and staff and provide staff development targeted to these needs. MISD should increase access to technology by purchasing mobile computer labs for the four elementary campuses that do not have any open computer labs. The one-time cost to implement this recommendation is $120,000.

- **Evaluate the effectiveness of educational services provided by the district's alternative education programs.** MISD's alternative education programs do not provide effective instructional and support services to meet student needs. The district's regular and disciplinary alternative education programs are affected by lack of leadership, low attendance, inequitable allocation of teachers, lack of access to qualified substitute aides, and lack of student data. These factors have a negative effect on the ability of MISD's alternative education programs to serve students effectively. MISD should review best practices in alternative education and restructure its alternative programs. In determining future leadership of the campus, the district should consider candidates who are proven leaders that can establish a positive culture and create a welcoming and caring environment while also enforcing attendance and discipline. The district should also ensure that both alternative programs have the staffing resources they need, including teachers who are effective in dealing with the student population in the programs, counseling staff, and aides. The district should re-configure the allocation of staff to each program because sharing staff between the two programs has not been equitable to students. In order to recruit qualified substitutes to serve as aides at the campus, the district should require a specific set of qualifications for these substitutes and consider an alternate pay scale for these positions. Additionally, the district should use technology for administrative purposes, develop a student data

system, and generate weekly reports on the alternative education programs.

- **Further develop teacher recruitment efforts and pursue multiple strategies to improve teacher retention rate.** MISD has low teacher retention and a high percentage of teachers with little or no professional experience. The district has had a high teacher turnover rate since 2004–05, ranging between 20 percent in 2005–06 and 26.5 percent in 2006–07. In 2007–08, the district exceeded the state average in teacher turnover by 10 percent and had 27 percent beginning teachers, compared to 8.2 percent for Region 13 and 7.9 percent for the state. MISD also had almost 10 percent more teachers with only one to five years teaching experience than did the region or the state. Exit surveys are mailed to departing staff when they leave the district, with the request that the surveys be completed and mailed back to the Human Resources Department. However, the district does not conduct analysis of the exit surveys or follow up with former employees who do not return the surveys. Additionally, MISD does not conduct face-to-face exit interviews, so the district may be missing an opportunity to capitalize on discussions with departing staff that could assist the district in identifying areas of success and areas of possible improvement. MISD should expand its efforts to develop additional strategies for teacher retention by having the superintendent form a committee to assist the Human Resources Department in developing a retention plan. MISD should review best practices for teacher recruitment and retention used successfully in other districts which include: developing strong relationships with departments of education at selected colleges and universities known for the quality of its teacher preparation programs; being more selective in its recruitment from alternative certification programs by identifying the most effective programs and limiting recruitment to those programs; and further developing a teacher induction and mentoring program and professional development that addresses the needs of new teachers. As part of this plan, the district should regularly review teacher salaries and compare them to other area school districts to ensure MISD is competitive with its neighbors. MISD should conduct their exit surveys in person as part of the exit process and analyze the feedback.

FINANCE

- **Introduce more site-based decision-making concepts into the budget development process.** The district does not provide budget managers with sufficient opportunities to participate in the budget process. Budget managers include principals, key administrators, and operations managers who are responsible for an area of the district's budget, such as a campus or a department. As a result, site-based budgeting principles are not practiced, which means that campus-based personnel, who should know best what is needed to ensure student success, are not fully involved in budget decisions. After budget managers submit their "needs" list, their involvement in the budget process is limited unless the superintendent's cabinet has questions about the "needs" list. When surveyed, 38 percent of principals and assistant principals felt that they were not given ample opportunity to participate in the development of their school's budget and determine how much money they will have for spending. Limiting the involvement of those who are closest to the action could result in misplaced funding priorities that could hamper the district's ability to achieve its educational goals. Site-based decision-making is a best practice among Texas school districts. TEA's Financial Accountability System Resource Guide (FASRG) states, "While site-based budgeting is not a statutory requirement, it is highly recommended that the superintendent, in collaboration with the school board, utilize site-based budgeting methods in the development of the school district's annual budget." As the district grows, it should introduce more site-based decision-making concepts into the budget development process. The goal should be to push more responsibility to the campus level by allowing principals and teachers to have greater involvement in the decision-making process. The deputy superintendent and chief financial officer should develop a plan for including more principals and campus-based personnel in the budget process, particularly as the district increases in size.

- **Strengthen Business Office internal controls.** Business Office internal controls are weak and in some cases nonexistent. As a result, the district is exposed to a multitude of risks including unauthorized and inaccurate transactions, misappropriation of funds, and the possibility of fraudulent transactions. In small school districts, segregation of duties is more difficult to achieve because there are fewer employees to perform tasks, and employees wear various "hats" and tend to operate in a more informal, personal manner. However, as a district grows, it is important to reexamine the internal control structure to ensure that duties are properly segregated and controls are in place and operating effectively. MISD continues to operate like a small district despite the fact that it has experienced significant growth. The Business Office has not kept pace with the need for stronger internal controls and greater segregation of duties. MISD's budget controls are weak because goods and services can be requisitioned even when there are no budget funds available to purchase them. Budgets are important features of internal control because they ensure that limits are placed on spending. In addition, MISD's segregation of duties is inadequate because Business Office employees have unrestricted access to financial and human resources modules of the financial accounting system that extends beyond what is necessary to perform their specific job duties. Segregation of duties is a critical component of internal control because it ensures that no one person has complete access to a process or function that would allow them to both perpetuate and cover up improper activities. The district should strengthen Business Office internal controls. MISD could use the Committee of Sponsoring Organizations of the Treadway Commission (COSO) best practice Internal Control – Integrated Framework (Framework), which focuses on achieving reliable financial reporting through components that work together to prevent, detect, or correct material misstatements of financial reports as a baseline for evaluating and improving the existing internal control structure. The Business Office should adapt the Framework to its circumstances and continually monitor adherence to its components as the district's internal control environment changes and evolves.

- **Establish appropriate segregation of purchasing duties in the Business Office.** MISD does not adequately segregate the functions of approving purchase requisitions, entering invoices received, and initiating vendor payments. A Business Office accounts payable clerk is assigned to review and approve purchase requisitions that are received online from campuses and departments. The same clerk can

change information on the purchase requisitions, add and delete line items, initiate purchase requisitions, approve them, and make payments. The accounts payable clerk also enters and approves purchase requisitions for the food services, transportation, payroll, and accounts payable departments. Additionally, the same clerk enters invoices as they are received at the Business Office and initiates the vendor payments. Segregation of duties is an important internal control intended to prevent or decrease the risk of errors or irregularities, identify problems, and ensure that corrective action is taken. Ideally, no single individual should have control over two or more phases of a transaction. MISD should reassign the accounts payable staff roles and responsibilities to ensure that the accounts payable clerk can only approve purchase requisitions and not enter or change purchase requisitions and purchase orders or process invoices.

OPERATIONS

- **Obtain training on the district's electronic routing software for the routing coordinator and upgrade the district's routing software to improve routing efficiency.** The Transportation Department has not conducted a systematic review of the productivity of its routes, not fully using its computerized bus routing and scheduling program. MISD uses the Transfinder electronic routing program to create its routes. The version used by the district is version 7.8. The newer 8.0 version provides expanded optimization capabilities to maximize the efficiencies of the routes by analyzing the location of students, schools, the roadway network, and limitations on attendance zones and hazardous walking areas and develop routes that minimize the mileage, time, or both as a way to minimize the costs and vehicle and personnel requirements. In addition, the current routing coordinator has been in the position for less than two years and has not received formal training on how to maximize the capabilities of the district's electronic routing and scheduling software. MISD should obtain training on the district's electronic routing software for the routing coordinator. This training coupled with an upgrade to the district's routing software can help the district improve its routing efficiency, allowing the district to move into a higher linear density group and qualify for a larger

per mile funding allotment by reducing the number of miles operated, which would increase the cost to the state treasury, and produce an annual fiscal impact for this recommendation of approximately $84,000 in savings.

- **Implement a regular bus procurement schedule that replaces large buses after 15 years and small buses after 10 years.** MISD does not have a bus replacement plan. The district purchases varying numbers of buses from year to year. Since 1990, bus purchases have ranged between a low of zero bus purchases to a high of 11 buses purchased in 2006–07. According to the general manager and maintenance supervisor, MISD has not retired any buses during recent years; only expansion buses have been purchased. As a result, 14 of 68 buses (21 percent of the fleet) are 15 or more years old. Besides replacing the existing fleet, MISD may need to buy additional vehicles to meet the demands of increasing student enrollment. The National Association of State Directors of Pupil Transportation Services released an issue paper on school bus replacement cycles recommending that school districts adopt a lifespan of 12–15 years for large buses and 8-10 years for small buses. This replacement schedule should be phased in over time to reduce the financial impact to the district in any one year.

- **Restore profitability in Food Service operations.** MISD Food Service has been incurring deficits for the past three years. Food Service had been profitable prior to 2006–07 and had a fund balance of $583,066 on August 31, 2005. Food Service has lost a total of $217,071 since that time, leaving a fund balance of $365,995 as of August 31, 2008. This trend has continued into 2008–09 with Food Service losing $20,605 between September 1, 2008 and February 28, 2009. Labor is the largest food service operation expense at MISD. The Food Service Department budgeted 58 percent of their revenues for salaries in 2008–09, an increase of 16 percent since 2004–05. A comparison of MISD's labor expenditure as a percentage of revenue to industry standards, as identified in *Managing Child Nutrition Programs: Leadership for Excellence, Second Edition (2008),* indicates that MISD is currently allocating at least 13 percent more of its revenue to labor than the recommended industry standard. The district should

implement the following actions to enhance financial accountability and become profitable: reduce labor costs by establishing meals per labor hour aligned to industry standards for each school and monitor meals per labor hour reports to make appropriate staffing adjustments; establish procedures to hold campus cafeteria managers responsible for the profitability of their operations; code students to the Excel High School when they are attending there; pre- and post-cost menus each week; establish procedures with school registrars to ensure all students are accurately coded as free or reduced on their first day of school; and maintain an electronic production and perpetual inventory. Implementing this recommendation could save the district more than $472,000 annually.

- **Implement innovative breakfast programs such as breakfast in the classroom and breakfast in a bag to provide students with greater and more convenient options to eat breakfast.** MISD has low breakfast participation despite offering a universal breakfast program where all students can eat breakfast free. While the percentage of eligible students eating breakfast has increased since 2005–06, only 53 percent of students eligible for free meals, 49 percent eligible for reduced price meals, and 35 percent of full-paying students ate breakfast at school between September 1, 2008 and March 15, 2009. The district does not offer alternative breakfast programs such as curbside breakfast-in-a bag, breakfast in the classroom, or breakfast on the bus. By not having alternative options for acquiring school breakfast, MISD is not ensuring that all children are receiving a nutritional breakfast, and the district is not maximizing federal reimbursement revenues. The district should implement innovative breakfast programs and consider offering a later breakfast for secondary campuses. Additionally, the district should set a goal of raising breakfast participation rates to a minimum of 75 percent. Implementation of this recommendation would result in the district incurring an annual cost of about $8,100.

- **Evaluate the process for selecting school sites using additional factors such as student accessibility and the cost of transporting all district students to school.** MISD's site selection process prioritizes land costs at the expense of other factors such as student accessibility and transportation costs. MISD selected

most of its school sites based on the available land being donated to or discounted for the district. As a result, several district campuses have been built near commercial areas, near heavily traveled roads, or near waste treatment facilities. Many of the district's schools have been built on sites that are not easily accessible for students, causing students to rely on district-provided transportation rather than having the ability to walk to school. Of the district's 11 schools, only the two recently constructed elementary schools are in neighborhoods that are secluded from heavy traffic and easily accessible by neighborhood students. The majority of the other district campuses are located on heavily traveled roads or in areas that lack communal infrastructure due to the district formerly being a rural community. Industry best practices can be used as guidelines for implementing successful site selection. MISD should review its process for selecting school sites and continue collaboration with community members concerning site selection.

GENERAL INFORMATION

- Manor is located in Travis County about 12 miles east of Austin on Highway 290.

- The City of Manor has grown in recent years and has a population of about 3,200 residents, up from 1,204 residents in 2000.

- The district's student enrollment in March 2009 was 6,327, with a student population of 58.7 percent Hispanic, 25.9 percent African American, 13 percent Anglo, 2.2 percent Asian/Pacific Islander, and 75.4 percent economically disadvantaged for 2008–09.

- The superintendent is Mr. Andrew Kim. Prior to his appointment as superintendent in July 2008, Mr. Kim served the district as the deputy superintendent for Curriculum and Instruction from June 2005 through December 2008, and interim superintendent from February to July 2008.

- In 2007–08, MISD had 784.2 full-time equivalent staff, with 50.1 percent or 392.6 being teachers.

- MISD received an *Academically Acceptable* rating for 2007–08 from the Texas Education Agency. During that school year, one campus received a *Recognized* rating, six received an *Academically Acceptable* rating, two received an *Academically Unacceptable* rating,

and two were new and were not eligible for an accountability rating from the state.

- In 2007–08, MISD had an overall Texas Assessment of Knowledge and Skills (TAKS) passing rate of 52 percent, which was 20 percentage points lower than the state average of 72 percent.

- MISD is served by the Regional Education Service Center XIII (Region 13) located in Austin.

- The legislators for the district are Senator Kirk Watson and Representatives Mark Strama and Dawnna Dukes.

SCHOOLS

- Oak Meadows Elementary School (Pre-K–5)
- Presidential Meadows Elementary School (Pre-K–5)
- Blake Manor Elementary School (Pre-K–5)
- Manor Elementary School (Pre-K–5)
- Decker Elementary School (Pre-K–5)
- Bluebonnet Trail Elementary School (Pre-K–5)
- Manor Middle School (6–8)
- Decker Middle School (6–8)
- Manor High School (9–12)
- Manor New Tech High School (9–12)
- Excel/MAP (Disciplinary and Alternative Education Programs)

FINANCIAL DATA

- Total actual expenditures (2007–08): $126.2 million.

- Fund balance: 29.5 percent of 2007–08 total budgeted expenditures.

- Preliminary Tax Rate (2008–09): $1.535 ($1.040 Maintenance and Operations and $0.495 Interest and Sinking).

- In 2008–09 MISD's Preliminary Property Wealth per Student was $438,269 with a Preliminary Wealth per WADA of $394,330.

- The percentage of total actual expenditures spent on instruction (2007–08) was 23.1 percent; total actual operating expenditures spent on instruction (2007–08) was 55.6 percent. The district's per pupil actual operating expenditure (2007–08) was $9,012.

- Instructional Expenditure Ratio (2007–08): 61.5 percent.

The chapters that follow begin with a summary of the district's accomplishments, findings, and recommendations. Detailed explanations for accomplishments and recommendations follow the summary and include fiscal impacts.

Each chapter concludes with a fiscal impact chart listing the chapter's recommendations and associated savings or costs for 2009–10 through 2013–14. Following the chapters are the appendices that contain the results from the district surveys conducted by the review team.

The following table summarizes the fiscal impact of all 76 recommendations in the performance review.

FISCAL IMPACT

	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) SAVINGS	ONE TIME (COSTS) SAVINGS
Gross Savings	$723,409	$721,139	$733,601	$714,201	$717,801	$3,610,151	$0
Gross Costs	($306,595)	($296,245)	($296,245)	($296,245)	($296,245)	($1,491,575)	($220,245)
Total	**$416,814**	**$424,894**	**$437,356**	**$417,956**	**$421,556**	**$2,118,576**	**($220,245)**

CHAPTER 1

DISTRICT MANAGEMENT AND COMMUNITY INVOLVEMENT

MANOR INDEPENDENT SCHOOL DISTRICT

CHAPTER 1. DISTRICT MANAGEMENT AND COMMUNITY INVOLVEMENT

Manor Independent School District (MISD) is located in Travis County and is part of the Austin-Round Rock metropolitan area. Manor is located about 12 miles east of Austin. The City of Manor was established in the mid to late 1800s and was named in 1872 after its postmaster. In the early 1900s it became a center for the Central Texas cotton and railroad industries. At present, Manor is close to several large technology companies including Applied Materials, Samsung Semiconductor, and Dell Computers. The City of Manor has grown in the past five years and has a population of about 3,200 residents, up from 1,204 residents in 2000. The student population in MISD has also grown in recent years to 6,327 in March 2009 and includes students who actually live in Austin. In 2007, the population of the City of Manor was 33.1 percent White, 16.9 percent African American, 48.8 percent Hispanic, and 1.2 percent from other racial or ethnic groups. The estimated median household income in Manor in 2007 was $42,453 compared with $47,548 in Texas, and the estimated median home value was $76,603 compared with $120,000 statewide.

District management in MISD is a collaborative effort between the board of trustees, superintendent, administration, staff, and community. School districts must have appropriate, effective, and efficient organizational alignment of duties and responsibilities from the board down to campus support in order to educate students. School board members must have a solid understanding of clearly delineated duties and responsibilities. Superintendents should establish a balance between setting the vision and goals, garnering support, managing finances, being the instructional leader, and delegating responsibility for daily activities that accomplish instructional requirements. Administrators must understand federal and state regulations, determine effective ways to implement the superintendent's directives, and manage staff. Campus administrators are required to understand the finances, implement central office directives, manage teachers and support staff, assist in the education of students, and stay abreast of new teaching methods. Collectively, the district's management team must be organized and committed to the same purpose and educational goals.

The responsibilities of school board members typically include setting the goals and objectives of the district, establishing district policy, overseeing the performance of the superintendent, and allocating the resources necessary to accomplish district objectives. Board members must also work collaboratively with each other and the superintendent in order to form an effective district leadership team.

Seven board members govern MISD. Each board member is elected at-large to staggered three-year terms. Two board members resigned effective December 2008, prompting the appointments of Daniel Turpin and Stan Voelker. Wendy Hutchinson resigned after serving on the board since 2003, and Mike O'Brien resigned after serving on the board for only six months. The Manor ISD School Board cancelled its May 2009 elections, as both the special election and general election were deemed unnecessary due to the uncontested races for the three available seats on the school board. As a result, Ben Arellano and Daniel Turpin maintained their seats, and Mike Thomas joined the board in the seat previously held by Stan Voelker.

Exhibit 1-1 presents the 2008–09 MISD school board members, their position, term information, and occupation.

Board meetings are held on the third Monday of each month. Regular meetings are held at 6:30 PM in the District Learning Center of the MISD Administration Building. In spring 2009, the board began holding its regular meeting at a school site to encourage the public to participate, a practice which will occur four times per year. The public is welcome to attend all meetings and citizens wishing to address the board about specific agenda items or other issues must complete the audience participation sign-up sheet upon arrival before the meeting begins. Citizens may speak during the public forum portion of the agenda, with each speaker's comments limited to five minutes. The board does not discuss or make decisions on any issues not posted on the agenda, including public comments. Any group of five or more wishing to address the board must appoint one person to represent the group's view to the board.

The board president, superintendent, and members of the superintendent's cabinet (comprised of the deputy superintendent, assistant superintendent, executive director for Human Resources, and the Business Office manager) determine the agenda items in accordance with Policy BE (LOCAL), which provides for an annual calendar of board agenda items. The agenda is then reviewed by the board

EXHIBIT 1-1
MISD SCHOOL BOARD MEMBERS
2008–09

NAME	TITLE	TERM EXPIRATION	DATE OF ORIGINAL ELECTION	OCCUPATION
Desiree Cornelius-Fisher	President	2011	May 1999	Entrepreneur
Ben Arellano	Vice President	2012	May 1996	Electrician
John Jonse	Secretary	2010	May 2007	Insurance Agent
Matildy Samaripa	Member	2010	May 2007	Contract Compliance Specialist
Melinda Fiebig*	Member	2011	May 2008	Office Manager
Daniel Turpin	Member	2012	Appointed January 2009	Retail Store Manager
Stan Voelker	Member	May 2009	Appointed January 2009	Construction Company Owner
Mike Thomas	Member	2012	May 2009	Business Management Consultant

*Ms. Fiebig resigned her position with the school board on June 5, 2009; Mr. Johnny Velasco was appointed to fill her position.
SOURCE: Information provided by MISD administration, March 2009.

president and superintendent before the regularly scheduled board meeting. The board president, on behalf of the board, can change the agenda as a result of items discussed with the superintendent and cabinet members. The agenda is finalized and posted 72 hours before the regularly scheduled board meeting. The board secretary, who is a member of the district's administrative staff, compiles the board packets, including all supporting documents, according to the final posted agenda. The board secretary provides the board packets to board members on the Thursday before the regularly scheduled Monday meeting. Each board member may contact the superintendent or cabinet members prior to the board meeting with questions or clarifications about information in the agenda packet.

As part of the management team, a district's superintendent plays a key role in effective district leadership. The superintendent is responsible for implementing procedures needed to accomplish district policy. As the instructional leader, the superintendent also bears primary responsibility for guiding the day-to-day operations of the district and managing staff. The superintendent is also considered the chief executive officer of the district.

Prior to his appointment as superintendent in July 2008, Andrew Kim served the district as the deputy superintendent for Curriculum and Instruction from June 2005 through December 2008, as well as the interim superintendent from February to July 2008.

Exhibit 1-2 displays MISD's organization for 2008–09.

Mr. Kim still retains most of the responsibilities he had as deputy superintendent, even though his executive leadership team (the superintendent's cabinet), is designated as responsible for the district's day-to-day operations and administration. The superintendent meets with the cabinet weekly to discuss issues affecting administration and operation of the district, status reports by cabinet members, and agenda item preparation for monthly board meetings.

The Instructional Leadership Team (ILT) meets monthly and consists of the superintendent, assistant superintendent, principals, the director of Curriculum and Instruction, instructional specialists, the director of Accountability and Data Analysis, the director of Professional Development and specialist, the coordinator of Federal and State Programs, and instructional program directors and specialists including Bilingual/ESL, Special Education, Instructional Technology, and Career/College Readiness and Guidance. During the ILT meetings, the superintendent communicates information resulting from decisions made by the cabinet that affect MISD's administration and operations and encourages the leadership team to discuss issues related to campus-specific administration and operations.

Districtwide communication is critical to the successful growth and development of any school district. The local Manor newspaper, distributed weekly, is the primary communication tool used to disseminate district and campus news, including board actions, academics, and athletics news throughout the MISD community. One of the superintendent's responsibilities is to keep board members

EXHIBIT 1-2
MISD ORGANIZATION
2008–09

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                              │    Superintendent   │
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Assistant Superintendent Administration and Human Resources				Deputy Superintendent	
Technology Services	Human Resources	Special Education	Principals (11)	Finance	Transportation Petermann Southwest
Family & Student Support Services	Child Development Center	Curriculum & Instruction	Bilingual & ESL	Environmental Services	Food Services
Health Services	After School Programs	Accountability & Data Analysis	Professional Development	Athletics	MAP/DAEP
		Federal & State Programs	CATE & College Readiness	Resources Management & Dropout Prevention	

SOURCE: MISD, June 2009.

informed of district activities and key decisions. Accordingly, each week the superintendent sends "Friday Notes," which is an email to all board members to keep them up-to-date on district issues and accomplishments from the previous week. Additionally, information is regularly posted on the district website. From the onsite visit, interviews with the board members and district staff, and the employee survey that was administered by the review team, it was determined that communication is very good between the board and superintendent but could be improved between the school district administration, staff, and community members.

Community involvement is an important component of a quality education system. It enables parents, civic and business leaders, community organizations, public officials, and community members with a stake in public education to understand the challenges and opportunities facing the

district and to become involved in activities and partnerships that support and promote student learning and achievement. School districts need the support of local organizations and businesses to strengthen educational programs. Outreach programs help district administrators become familiar with community needs and priorities.

Effective community involvement programs build upon the unique characteristics of a school district and its community. An essential component of community involvement includes methods for recruiting volunteers and soliciting business support for school events and outreach activities designed to encourage community participation in the district. Strategies for communicating with the community as well as within the school district are also critical.

Successful communication strategies strive to involve businesses, community organizations, and parents. Strategies

may include newsletters, brochures, articles, and reports in the local media, meetings and public forums, websites, and school calendars. In districts with an ethnically diverse population such as MISD, it is important for the district to make efforts to involve and coordinate with the non-English speaking community. Effective and timely communication builds trust and support for the district and its programs and influences how residents view the district.

ACCOMPLISHMENTS

- MISD strives to increase community involvement in monthly school board meetings.

- MISD is implementing a three-year school-based mentoring grant, Project Mentor, to assist students academically and provide them with friendship, encouragement, and a positive role model.

- The MISD Student and Family Support Services Department fills the gap in availability of support services in the Manor community to help students and their families.

- The Manor Education Foundation (MEF) supports students and teachers through scholarships, grants, institutes, and special programs.

FINDINGS

- The MISD superintendent assumes too much managerial responsibility related to the day-to-day operations of the district.

- MISD does not have a comprehensive strategic plan to effectively manage the affairs of the district.

- New school board members in MISD have not always received their local district orientation within 60 days of joining the board as required by the Texas Administrative Code (TAC) and MISD board policy.

- Administrative support for the MISD school board is provided in an inefficient manner, as duties are split between two district positions.

- The timing of Executive Session during regular school board meetings discourages parent and community participation in the meetings.

- Leadership development is lacking for principals, assistant principals, and key administrative staff in MISD.

- MISD lacks a coordinated district community involvement plan.

- MISD's district and campus web pages are underdeveloped with regards to parent and community information.

RECOMMENDATIONS

- **Recommendation 1: Consider revising the administrative organization structure to ensure a balance of responsibilities among district leaders.**

- **Recommendation 2: Develop a comprehensive strategic plan that links the district's goals and objectives to the budget.**

- **Recommendation 3: Develop a process to ensure that new board members receive their local district orientation within a timely fashion as required by the TAC and district policy.**

- **Recommendation 4: Transfer all board administrative support duties to the board secretary.**

- **Recommendation 5: Restructure the format of school board meetings to encourage parent and community involvement.**

- **Recommendation 6: Ensure that all district and campus administrators regularly participate in professional development activities focused on leadership development.**

- **Recommendation 7: Develop a coordinated district community involvement plan.**

- **Recommendation 8: Develop Parent and Community web pages for the district and campus websites.**

DETAILED ACCOMPLISHMENTS

BOARD MEETINGS IN THE COMMUNITY

MISD strives to increase community involvement in monthly school board meetings. During 2008–09, MISD realized that the large geographic size of the district and the small size of the District Learning Center were impeding the community from active involvement in school board meetings. In March 2009, the district held its monthly board meeting at Manor Elementary School instead of at the District Learning Center. As a result, approximately 100 community members and parents were in attendance. Community participation in

board meetings often improves when board meetings are conveniently situated within the various communities throughout a district. It is critical that board members recognize effective governance requires input from the community they are elected to serve. Once the community is engaged in the board's decision-making processes, additional support can be garnered for board actions taken on behalf of the district. The MISD school board plans to hold its scheduled monthly meetings at various campus locations throughout the community four times yearly.

MENTORING GRANT

MISD is implementing a three-year school-based mentoring grant, Project Mentor, to assist students academically and provide them with friendship, encouragement, and a positive role model. The three-year United States Department of Education grant, which totals $190,000 per year, began in 2007–08 and is administered by two full-time staff members and five after school community service instructors.

MISD has a high percentage of minority, at-risk, and economically disadvantaged students. The percentage of these student populations is higher than the regional and state rates: in 2007–08, 86.5 percent of MISD students were minorities; 58.3 percent were at-risk; and 67.9 percent were economically disadvantaged (**Exhibit 1-3**).

The district recruits mentors by placing advertisements in the local newspaper; on the district web page; hanging large banners around the community; making presentations to business partners; organizing activities during January, which is recognized as "Community-Wide Mentor Month;" and through school-parent liaisons. Before a mentor can be matched and start working with a student, the adult must attend a mentor training session, complete and return a mentor application, pass the criminal history/background check, and provide contact information and three personal references.

Mentors participating in the Project Mentor program go to the school of their respective student once a week during lunchtime or after school for a minimum of 45 minutes. During their time together mentors and students can engage in a wide range of activities such as reading a book, completing homework, discussing managing time effectively, conducting research on the Internet, talking about what happened during the day, or working to develop effective study habits. Mentors keep a portfolio of their mentoring contacts and activities and log their contact with the student and record observations of what is working, challenges and concerns, and the mentor's and teacher's next steps.

In addition to one-on-one mentor matches, Project Mentor offers services to the child and the family. It offers case management services for the mentored student and the family, participation in community service projects, career exploration, college readiness opportunities, parent education, summer camps, and educational field trips. For example, in March 2009, 50 Project Mentor students took a field trip into Austin to explore the University of Texas. In May 2009, 130 Project Mentor and Project Hope students in grades 3 through 8 attended a field trip to NASA.

Although Project Mentor is designed to target students in grades 4 through 8, MISD has matched mentors to students from Kindergarten to grade 11. In 2008–09, MISD had 124 mentors, with plans to have more than 200 mentors in 2009–10. Grades 4, 5, and 6 account for the largest number of mentored students. A testament to Project Mentor's success lies in the waiting list for mentors. More than 100 students are on the waiting list.

Project Mentor involves students and their mentors in a variety of community service projects (**Exhibit 1-4**). These projects involve MISD elementary and middle school students.

EXHIBIT 1-3
STUDENT DEMOGRAPHIC CHARACTERISTICS
MISD, REGION 13, AND THE STATE
2007–08

	ENROLLMENT	AFRICAN AMERICAN	HISPANIC	ANGLO	OTHER ETHNICITY	AT-RISK	ECONOMICALLY DISADVANTAGED
MISD	5,825	26.8%	57.5%	13.6%	2.2%	58.3%	67.9%
Region 13	343,808	9.6%	40.8%	45.6%	4.0%	43.2%	43.3%
State	4,651,516	14.3%	47.2%	34.8%	3.7%	48.4%	55.3%

Source: Texas Education Agency, Academic Excellence Indicator System (AEIS), 2007–08.

EXHIBIT 1-4
PROJECT MENTOR INITIATED COMMUNITY SERVICE PROJECTS
2007–08 AND 2008–09

PROJECT	SERVICES
	2007–08
Nursing Home Visit Project	Presidential Meadows Elementary School students painted ceramic pots and planted flowers that were delivered to the nursing home where a parent of one of the Project Mentor students resided.
Ronald McDonald House Tab Project	Manor Middle School and Decker Elementary School students collected pull-tabs and received recycling funds to support the Ronald McDonald House. The funds were used to purchase food for the family food pantry, purchase cleaning supplies, and provide transportation to and from the hospital.
Fundraiser for Students Living in Africa	Project Mentor students from Manor Middle School raised funds and collected books for disadvantaged students in Africa.
Campus Clean Up	Manor Middle School students were involved in a campus clean-up for three weeks in the after-school program.
Community Garden Grant	The Manor Farmer's Market director, MISD director of Student and Family Support Services, and Project Mentor coordinator submitted an application to Applied Materials for a grant to fund community gardens at Manor's six elementary schools.
	2008–09
Jingle Bell 5K Run	On December 14, 2008, 18 students and their mentors and volunteers took part in the Jingle Bell 5K Run that benefited Mothers Against Drunk Driving (MADD). The project built awareness of the risk of drinking, involved students in a physical activity, and raised $350 for MADD.
Meals on Wheels Garden Project	On March 20, 2009, students participated in a Meals On Wheels Garden Project. The project was initiated through the Manor Farmer's Market and had students decorate containers with potted vegetables that were donated to Meals On Wheels recipients.
HEROS at Oak Meadows Elementary School	Project Mentor funded a leadership project at Oak Meadows Elementary School through SafePlace. The project consisted of eight one-hour sessions on recognizing behaviors associated with bullying and developing strategies to stop it.
Summer Leadership and Community Service Summer Opportunity	In Summer 2009 Project Mentor students will participate in a leadership program and community service projects in Manor and Austin.

SOURCE: MISD, Project Mentor Community Service Update, 2007–08 and 2008–09.

A 2008 survey of students, teachers, and volunteers pointed to positive Project Mentor outcomes. Teachers who responded to the survey indicated that:

- 82 percent of the students who are involved in Project Mentor increased their class participation;

- 55 percent increased their class preparedness (homework); and

- 55 percent showed an improvement in their relationships with adults.

Students who responded to the survey reported that they felt comfortable with their mentor, and:

- 92 percent enjoy the program;

- 88 percent want a mentor next year;

- 83 percent feel very special when they are with their mentor; and

- 40 percent reported that they liked best having someone who can listen to their problems, care and guide them.

Research has shown that having caring adults in a child's life promotes positive behaviors. Children and youth who receive support and guidance from a caring adult will show, according to research, improvement in academic performance, higher attendance, and a reduction in discipline referrals. Mentored children and youth also tend to stay in school and develop positive interpersonal relationships. The mentor helps the child develop his/her talents and strengths and supports the efforts of teachers and parents.

FAMILY ASSISTANCE

The MISD Student and Family Support Services Department fills the gap in availability of support services in the Manor community to help students and their families. The Student and Family Support Services (SFSS) Department is the focal point of MISD's community involvement initiatives and activities. The department provides services to students with attendance problems; mental health and behavioral issues; medical and dental problems; hygiene issues; pregnancy and parenting needs; abuse, neglect, and violence issues; and clothing, food, and housing needs. The SFSS Department consists of a director, two staff administering Project Hope, two staff administering Project Mentor, two parent liaisons, and an administrative assistant. One of the parent liaisons works with elementary schools and the Children's Partnership; the second parent liaison works with secondary schools and migrant education.

The SFSS Department assists students and their families by referrals to appropriate social service or medical resources. It helps students in crisis, offers parent and community education opportunities, lends parenting materials, involves students in community service, interprets for parents who do not speak English, and creates opportunities for parents to become involved. The department works with a large number of social and community service groups, as shown in **Exhibit 1-5**.

In addition to the rich array of services the SFSS Department provides, it also implements monthly events to help students and families. Specifically, the department uses the following programs and strategies to meet the needs of students and their families:

- Campus attendance clerks notify the department about students with a large number of absences. Department staff meet with the student to determine reasons for the absences, contact the parents to make them aware of the issue, make a home visit to stress the importance of daily attendance, meet with the student, parent, and teachers/administrators, and refer the student and family to outside resources as needed.

- The department works with several medical, dental, and mental health organizations to meet the healthcare needs of students and their families. These include the Children's Partnership, a mental health and social services collaborative located in Austin that coordinates local resources to provide a full range of services to children and adolescents with serious emotional disturbances. The department also works with the People's Clinic, St. David's Dental Program, the Vision Service Plan (VSP) – Sight for Students Program, and the Texas Vaccines for Children. The People's Clinic has both a pediatric clinic and an adolescent clinic. St. David's Community Health Foundation Leadership Dental Program provides

EXHIBIT 1-5
SOCIAL AND COMMUNITY SERVICE GROUPS ASSISTING MISD STUDENTS AND THEIR FAMILIES
2008–09

SOCIAL AND COMMUNITY SERVICE GROUPS	
Applied Materials	Lisa's Hope Chest
Austin Community College	Manor Volunteer Fire Department
Austin Jazz Workshop	Manos de Christo
Austin/Travis County Mental Health Mental Retardation	People's Community Clinic
Ballet Austin	Regional Education Service Center XIII (Region 13)
Catholic Charities of Central Texas	Samsung Semiconductor
Central Texas Tennis Association	St. David's Community Health Foundation Leadership Dental Program
East Rural Community Center	Texas Advocacy Project
GENAustin	Texas Heath and Human Services Commission
Goodwill Industries – Youth Services – Workforce Investment Act Program	Texas State University Talent Search
Lower Colorado River Authority	Travis County Attorney's Underage Drinking Prevention Program
Lifeworks	Zachary Scott Theatre

Source: MISD Student and Family Support Services Department, 2008–09.

routine and emergency dental treatment, prevention and emergency services including exams, fillings, extractions, cleaning, and occasional root canals. It also provides a Sealant Clinic and oral health education. The VSP – Sight for Students Program serves uninsured, low-income families and pays for students' eye exams and glasses. The Texas Vaccines for Children is a federally funded program that offers vaccinations at no cost to children 18 or younger who are Medicaid eligible, uninsured, or underinsured. The department also offers access to Austin/Travis County Mental Health Mental Retardation (MHMR) and Lifeworks to bring counseling services to students.

- Through the three-year Project HOPE grant, the SFSS Department served 520 MISD students who were homeless in 2008–09. In 2007–08, the department served 417 students through the grant. Staff works with MISD schools to identify homeless students, provide school supplies, emergency clothing, food, emergency medication, emergency utility assistance, and adult mentors. Several of the schools have large numbers of homeless students, including Manor Elementary, Blake Manor Elementary, Decker Elementary, Manor Middle School, and Manor High School.

- Through the Project Mentor grant, the SFSS Department matches mentors to students. In 2008–09, there were 124 mentors. The mentors provide academic support, encouragement, and friendship.

- Before the start of the school year, the department holds the Annual Resource Fair/School Supply Distribution Day. The event, implemented seven years ago, draws a large number of community service agencies (47 in 2007) to inform families about available resources and answer questions. The department also distributes bags of school supplies to needy students. In 2008–09, the department assisted more than 1,400 students. The department advertises the event in *Hoofprints*, the district's newspaper.

- The department organizes an annual Coat and Shoe Distribution event. The November event, implemented since 2001, distributed 300 new pairs of shoes and 200 new coats in 2008, purchased through $20,000 in donations from local businesses.

- The department offers daytime and evening literacy, English as a Second Language (ESL), and General Education Development (GED) classes free of charge to parents. The evening classes, offered at Excel High School, meet for two hours twice per week. In 2008–09, 75 parents participated in the classes. The daytime classes offered through the Even Start Family Literacy program meet twice a week from 8:30 AM to 2:30 PM and serve 25 parents.

- The department distributes holiday baskets to needy families for Thanksgiving and Christmas.

- In collaboration with other departments, the SFSS Department has also organized events, such as the Bilingual Information Night for Spanish-speaking parents; an information session on summer camp programs for parents with children receiving special education services; and the African American Man and Boy Conference—a motivational event that 183 students and 32 parents attended.

Through this array of services and with the help of its partners, MISD helps a large number of its students and their families meet needs and obtain services not available to them otherwise.

EDUCATION FOUNDATION

The Manor Education Foundation (MEF) supports students and teachers through scholarships, grants, institutes, and special programs. The MEF was established in 1999 as a 501(c) (3) non-profit education organization, and is governed by a 15-member board. One of the board members is also a member of the MISD school board. The MEF is supported through contributions from corporate sponsors, foundations, private donors, and members.

The MEF goals are to (1) enable businesses, organizations, and individuals to have a positive impact on the education process in MISD; (2) assist educators to improve the quality of education at MISD through innovative projects; and (3) fund projects that will increase student capacity for learning and retention of knowledge. The following details how the MEF has addressed these goals:

- The MEF has awarded $76,522 in innovative education grants and new teacher grants. The purpose of these grants is to encourage and promote innovative and creative instructional approaches; specifically, promoting reading, writing, and math proficiency; enhancing student communication skills; increasing

student self-confidence; and incorporating parental involvement and technology. The MEF awards grants to teachers for one year for up to $2,000 each.

- The MEF has awarded $167,000 in scholarships to graduating students. Scholarships are awarded to students who exhibit a high level of moral character, demonstrate financial need, show leadership potential, and maintain good academic standing. In 2006, the MEF received a $1,000,000 endowment from Samsung Semiconductor. The endowment stipulates that the MEF can only use the interest proceeds to award scholarships, leaving the principal of $1,000,000 intact.

- The MEF has funded special projects such as the renewable energy marquee for Manor New Tech High School using a grant from Applied Materials.

- Over the past four years, the Foundation has hosted the School Board Candidate Forum in order to increase awareness of community needs.

Since its establishment, the MEF has awarded 37 scholarships to students and 51 innovative grants to teachers. Since 2006, the Foundation awarded nine laptops to students—three laptops per year. The laptops, donated by Samsung Semiconductor, are awarded to graduating students who applied for scholarships. In addition, the Foundation awarded three $100 grants to new teachers for classroom materials.

The Foundation has been very successful in recruiting members and partners among local businesses and large corporations such as Samsung Semiconductor, IBM, Applied Materials, AT&T, HEB, Comerica Bank, Waste Management, Washington Mutual, and First Southwest Company. The Foundation organizes two fund raising events each year: the Gala in February and a golf tournament in August. Also of note, the Foundation received land from donors and turned the land over to the district; the district used the land for school construction.

DETAILED FINDINGS

SUPERINTENDENT RESPONSIBILITIES (REC. 1)

The MISD superintendent assumes too much managerial responsibility related to the day-to-day operations of the district. The superintendent is the former deputy superintendent of Curriculum and Instruction. In addition to assuming the chief leadership role for the district when he was hired to fill the super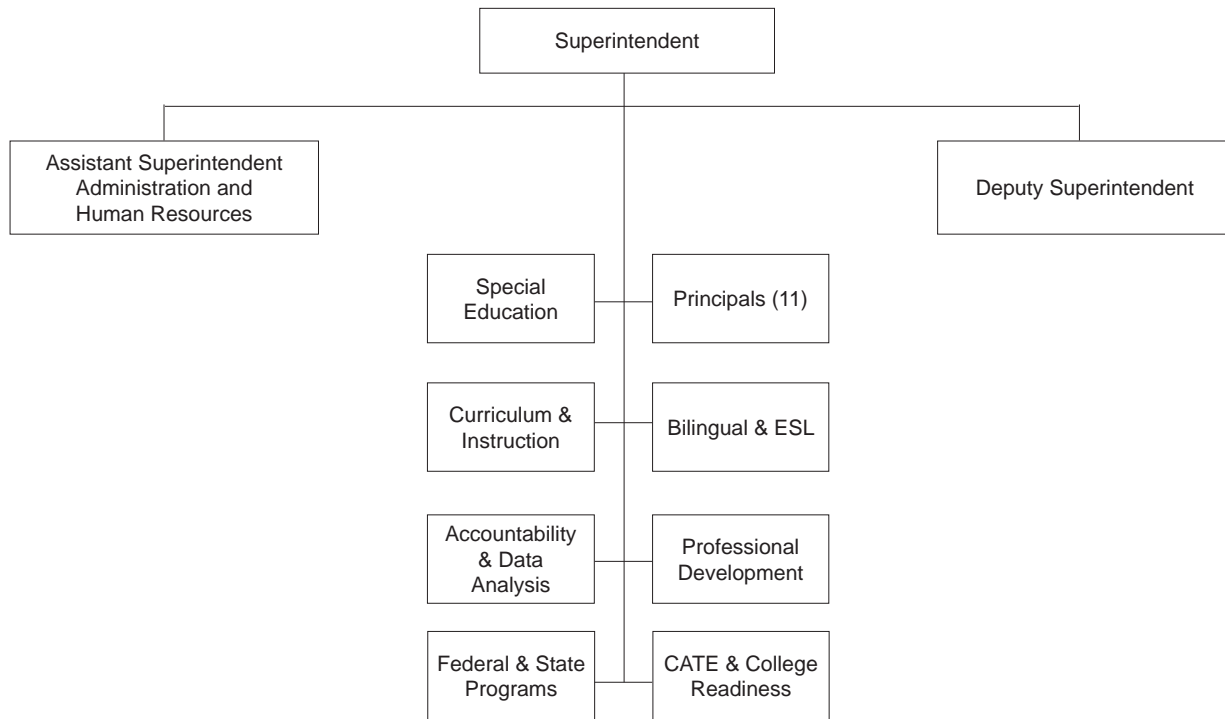intendent position in July 2008, the superintendent has retained all the previous responsibilities he had as deputy superintendent.

Superintendents are responsible for a multitude of functions and results in school districts. They must establish a balance between setting the vision and goals, garnering support, managing finances, being the instructional leader, and delegating daily activities that accomplish instructional requirements. As seen in **Exhibit 1-6**, the MISD superintendent currently has 20 direct reports, including the 11 campus principals. This number of direct reports far exceeds the span of control or "rule of thumb" of six to eight employees for a supervisor. The rule, however, is contingent on a number of factors, including the breadth of responsibility in addition to the supervisory demands. The demands of the MISD superintendent do not adequately provide time to directly supervise the diversity and number of his current employee reports. Additionally, the consensus among school board members interviewed is that the superintendent does not effectively delegate or distribute district administrative and instructional responsibilities. Board members consistently cited the superintendent's lack of delegation as one of their greatest concerns.

Manor ISD's peer districts, which are school districts similar to Manor ISD that are used for comparison purposes, effectively divide responsibilities and reporting under their superintendents. Most have an assistant superintendent or deputy superintendent for the following areas: Curriculum/Instructional Services/Accountability; Student Services or Support Services/Administrative Services; and Business/Finance—each of whom report directly to the superintendent.

MISD should consider revising the administrative organization structure to ensure a balance of responsibilities among district leaders. As the district's growth stabilizes and the superintendent becomes more confident in the skills of the leadership team, revision of the organizational structure will narrow his span of control, allowing him to effectively delegate his current workload and providing him more time to focus on the critical issues related to district oversight. As part of the revision process, the district should consider reporting relationships, including the number of employees each manager supervises, and take into account the skills, management styles, and statutory responsibilities involved.

EXHIBIT 1-6
MISD ORGANIZATION
DIRECT REPORTS TO SUPERINTENDENT
2008–09

Possible revisions to the administrative organization structure could include:

- Formalizing the structure of the Curriculum and Instruction Department, with leadership for the department provided by the director of Curriculum and Instruction, who would report directly to the superintendent, and whose position could eventually be elevated to that of an assistant superintendent. The department would be comprised of special education; bilingual, ESL, and federal programs; accountability and data analysis; Career and Technical Education (CTE) and College Readiness; and would have oversight responsibility for the district's alternative education programs. The district could also consider having campus principals report to this department leader.

- Moving the director of Professional Development under the assistant superintendent for Administration and Human Resources, with the position reporting directly to the Executive Director of Human Resources.

- Creating a Public Information Officer position under the assistant superintendent for Administration and Human Resources. According to the district, press releases and open records inquiries are currently handled by the assistant superintendent. However, materials examined during the review indicate that press responses may be directed to individual staff members. Having one position dedicated to all public information-related activities would create efficiency and consistency of external district communications and reduce the duties of the assistant superintendent.

No fiscal impact is provided for this recommendation. As there is no specific timeline for creation of additional positions, the superintendent will determine the need and cost for any positions.

STRATEGIC PLANNING (REC. 2)

MISD does not have a comprehensive strategic plan to effectively manage the affairs of the district. The district uses its district improvement plan (DIP) as a substitute for a comprehensive strategic plan. The DIP is focused on instruction and includes student achievement, fiscal

responsibility, community involvement, personnel, and safety as they relate to the delivery of educational services. The DIP does not address transportation, food service, asset and risk management, and other areas of district operations. As a result, planning for items such as non-instructional personnel, growth, and risk management is addressed in ancillary documents that are not integrated into a single comprehensive strategic plan, nor do board and administration driven goals and objectives address these areas. Additionally, while the DIP lists the funding sources to be used under the "Resources" section of the DIP, there is no direct link to the district's budget in this document.

Some MISD departments, such as the Human Resources Department, use the DIP to drive the creation of their own strategic planning document for the year. However, this practice is not uniform across the district. In addition, MISD's schools use the DIP as the basis for their campus improvement plans (CIPs).

Comprehensive strategic plans are crucial to effective governing of school districts. Strategic plans serve as a management tool for the board, superintendent, and community. School districts use comprehensive strategic plans to set academic, operational, and financial goals for all district operations. Each goal is tied to student achievement, includes resources needed, implementation personnel, timelines, action items, performance measures, and funding required. Strategic plans allow school districts to overcome unforeseen events more quickly, allocate resources to meet objectives more effectively, and create accountability standards more efficiently. Many districts also use the achievement of strategic plan goals as part of a superintendent's performance evaluation. Once developed, strategic plans become a living document in that they are updated on an annual basis and approved by the board.

Exhibit 1-7 provides a sample model of a strategic planning process.

MISD should develop a comprehensive strategic plan that links the district's goals and objectives to the budget. The District Advisory Team (DAT) should be tasked with outlining the goals and objectives for all of the district's operations, identifying all resources required to accomplish the goals, forecasting the dates for completion, and selecting

EXHIBIT 1-7
STRATEGIC PLANNING PROCESS
SAMPLE MODEL

STEP	PURPOSE
Step 1: Vision Setting	The board, superintendent, and key stakeholders engage in a vision setting process to determine what characteristics the district should have if it operated at the most optimal level.
Step 2: Mission and Goals	The board, superintendent, and key stakeholders identify a mission and associate goals that if accomplished will bring the district closer to fulfilling its vision.
Step 3: Setting Priorities	The board prioritizes the district's most important goals to serve as the basis of the strategic plan.
Step 4: Identifying Barriers	The board, superintendent, and leadership team use data to identify the key barriers to accomplishing the goals.
Step 5: Identifying Resources	The administration links the budgeting process to the planning process to ensure that district goal priorities are reflected in budget allocation.
Step 6: Strategy	The superintendent, administration, and key stakeholders including parents, business leaders, civic organizations, and community groups develop strategies to accomplish the goals by addressing the identified barriers, creating timelines for completion, assigning accountability, identifying performance measures, and allocating resources.
Step 7: Consensus Building, Review, and Approval	The board, superintendent, and stakeholders build consensus, review the plan for viability and approve the final document.
Step 8: Implementation and Monitoring	Persons or departments with assigned accountability enact the plan strategies, while monitoring progress against performance measures and use of allocated funds.
Step 9: Evaluation	The district evaluates the success of the plan, which performance measures were met, what goals were achieved, and what obstacles prevented success. The superintendent presents findings to the board.

Source: MJLM best practice research.

the staff within the district responsible for achieving the goals within the established timelines. The strategic plan should include performance measures for each goal and objective, and should serve as the basis for the operations of the district and help guide the board when evaluating the superintendent and allocating resources. This recommendation can be implemented with existing resources.

NEW BOARD MEMBER REQUIRED ORIENTATION (REC. 3)

New school board members in MISD have not always received their local district orientation within 60 days of joining the board, as required by the Texas Administrative Code (TAC) and MISD board policy. The TAC, Title 19, Part 2, Chapter 61, Rule 61.1 (b) (1) (A), as well as MISD Policy BBD (LEGAL) requires all new school board members across the state to participate in a local district orientation within 60 days of election or appointment to the board. Two recent additions to the school board did not participate in a local orientation within 60 days. One member, elected on May 10, 2008, did not receive the district's local orientation until July 15, 2008. Another board member appointed in January 2009 had not participated in the district's local orientation as of the time of onsite visit in March 2009, but had attended other board-related trainings in February 2009.

The MISD board secretary maintains board training records. Board members are required by the Texas Education Code (TEC) §11.159 (b) and MISD Policy BBD (LEGAL) to attest that they have attended annual training as required of them by the State Board of Education (SBOE). The district keeps records of these attestations and compiles the information into a consolidated board training report. The board training report dated January 26, 2009 indicated that all SBOE continuing education requirements, including the local district orientation, had been met. However, interviews conducted during the onsite visit and training records provided to the review team do not support this assertion.

Ensuring board members obtain the required continuing education is essential to having a board that is informed about district policies, educational laws, requirements, and best practices in governance. When board members do not receive the required training, the risk of exposure related to nonperformance of governance functions prescribed by state statutes increases.

Current budgetary and operational decisions could have potential adverse affects on the district's operations in future years. During the March 2009 board meeting, a board member who was making a motion to approve an agenda item made a comment that he was moving to approve since most of the members didn't understand what was being discussed anyway. While this comment may not be reflective of the entire board's position, it was made in open session and should be properly addressed through training.

MISD should develop a process to ensure that new board members receive their local district orientation within a timely fashion as required by the TAC and district policy. The board secretary should work with the superintendent and board president to review future election dates and select dates for local district orientations for any new board members in order to ensure all new members receive the orientation within 60 days of their election to the board. The board secretary should also monitor board member training records to ensure that members are attending all trainings on an annual basis as required by the SBOE so that board member attestations and training reports are accurate. This recommendation can be implemented with existing resources.

BOARD ADMINISTRATIVE SUPPORT (REC. 4)

Administrative support for the MISD school board is provided in an inefficient manner, as duties are split between two district positions. The board secretary is responsible for most of the daily tasks required to support the MISD school board, and the district's Texas Association of School Boards (TASB) Policy Administrator, who also serves as the director of Accountability and Data Analysis, is responsible for all board policy updates.

The board secretary has held the position since July 2005. The job description for the board secretary states that the primary purpose for this position is to "Ensure the efficient operation of the school board office and provide clerical services to the board of trustees." Major responsibilities for this position include:

- prepare and post official board agenda and records (including board training records);

- record minutes of executive staff and board meetings as required;

- collect, organize, copy, and bind all materials for board meetings and distribute to board members;

- distribute board materials to administrators, principals, and media;

- maintain physical and computerized files, including board minutes and closed session records; and

- assist with travel arrangements for board members as needed.

The director of Accountability and Data Analysis has served in the TASB Policy Administrator position since 2004, a function that accounts for approximately 20 percent of the director's time. The work for this position was intensive in summer 2008, when the district conducted a full policy review with TASB. As a result of this process, the district added, deleted, or replaced 45 LEGAL and LOCAL board policies. The ongoing policy-related duties of this position include:

- working with TASB consultants to identify MISD board policies, both LEGAL and LOCAL, which require revision or update;

- facilitating the policy revision process; and

- presenting updated policies to the board for approval.

Assigning two positions the responsibility of providing administrative support for the school board is inefficient. The two positions are not currently housed at the same location, so materials used to support the board are located in separate places. Board members and district staff must work with two different people when working on board issues. Additionally, in today's education environment, accountability and data are critical pieces to the every day activities of a school district. Requiring the director of Accountability and Data Analysis to split time between two unrelated jobs makes it more difficult to ensure success in the primary job function.

MISD should transfer all board administrative support duties to the board secretary. In addition to the current responsibilities of the position, the board secretary should also assume the responsibilities of the district's TASB Policy Administrator position. Having all board-related responsibilities assigned to one person will increase the efficiency of board activities. This transfer of duties should begin in summer 2009, when all district administrative staff move to the new district administration building. The director of Accountability and Data Analysis will be working in the same building as the board secretary, so training on and transition of board policy duties can be facilitated to the board secretary in a smooth manner. This recommendation can be implemented with existing resources.

BOARD MEETING STRUCTURE – EXECUTIVE SESSION (REC. 5)

The timing of Executive Session during regular school board meetings discourages parent and community involvement in the meetings. The board convenes into Executive Session, which is closed to the public, approximately halfway into each board meeting. Parental and community participation in MISD board meetings decreases based on the perceived duration of the meeting and agenda order of discussion items. As a result, the community's voice may not be heard on critical district business when the items are set to be discussed once the board returns from Executive Session.

The Texas Government Code, Title 5, Chapter 551, Section 101 states that a closed meeting can be held as long as the board first convenes in an open session before adjourning to discuss allowable matters in Executive Session. Subsequently, Section 102 of the same title and chapter requires that a vote must be taken in open session to finalize any action discussed in the closed session.

Section 105 of the MISD Board Manual provides a sample board meeting agenda which suggests that Executive/Closed Session should be held immediately after the Call to Order. However, the agenda for the March 2009 school board meeting lists the agenda items in the following order: (1) Call to Order; (2) Presentation of Colors/Pledge of Allegiance and Presentation; (3) Welcome/Recognition of Special Guests; and (4) Adjourn to Closed Session. The Public Forum, Consent Agenda, and Action and Information Items did not occur until after the board returned to Open Session.

The Manor ISD community is fairly proportionally represented by the MISD school board, considering all positions are at-large elections. This proportional representation reflects the interest that the community has in actively participating in MISD. As such, it is critical that the school board meetings be designed to regularly encourage the community's involvement in the education and development of their children. Historically, MISD board meetings have been long, occasionally lasting almost 5 hours, but typically starting at 6:30 PM and adjourning sometime after 10:00 PM Parental and community participation in MISD board meetings decreases when the duration and agenda order are not convenient to their interests. Even when matters of importance are part of the agenda, parents are not inclined to remain during the closed session due to the inability to predict the length of the session. If the community doesn't attend the meeting or doesn't stay to receive the information

critical to district operations and the education of the students, then the participation effort loses its maximum impact.

When a school board's Executive Session is placed in the middle of the board meeting agenda, many attendees may leave, even though critical district business and information is set to be discussed once the board returns to open session. A community might be better able to participate in the critical matters if closed sessions did not occur during the middle of the board meeting. Since board agendas are required to be posted 72 hours prior to the meeting, community members could adjust their schedules to plan attendance at the board meetings during personally relevant board action items.

MISD should restructure the format of school board meetings to encourage parent and community involvement. One possibility the district could consider would be to conduct Executive Sessions immediately after commencing the board meeting, as detailed in the MISD Board Manual sample meeting agenda and provided for by the Texas Government Code. This structure would provide for the full agenda to be conducted in an open session, beginning at approximately 7:00 PM, pending the meeting start time and duration of the executive session and maximizing the ability for community and parental participation in all items scheduled on the agenda. This recommendation can be implemented with existing resources.

LEADERSHIP DEVELOPMENT (REC. 6)

Leadership development is lacking for principals, assistant principals, and key administrative staff in MISD. The district has an extensive professional development program, and professional development is emphasized for instructional personnel, but district and campus administrators do not receive adequate training on how to manage and run their campuses within the district structure. Several campus principals and district administrators are new to the district and new to their leadership roles. Without proper training they may lack the understanding of how crucial their role is to the overall leadership, organization, and management of the district as a whole.

Interviews conducted with MISD personnel revealed that a curriculum for districtwide leadership training does not exist. Instructional leaders received professional development related specifically to their position, but other district staff was not receiving regular training. Additionally, employees in

supervisory positions did not receive management training before assuming these responsibilities.

In summer 2008, MISD offered seven half-day, full-day, and two-day mandatory sessions for district and campus administrators on subjects such as Legal Updates, Accountability and Beyond, a Policy Review seminar, Technology Tips and Tools for Administrators, Data Driven Decisions, Creating More Powerful Designs for Professional Learning, and a leadership retreat. No courses were offered related to basic management skills such as interviewing techniques, time management, team development, and dealing with personnel issues.

Professional development for district and campus administrators is an important component in the retention of the administrators and instructional personnel. Leadership training is necessary to ensure district employees are properly coached on how to be effective leaders, since effective leaders are crucial to the success of the district, both academically and financially.

MISD should ensure that all district and campus administrators regularly participate in professional development activities focused on leadership development. The district should investigate professional development opportunities provided by regional education service centers, education organizations, and private vendors. Courses which might be appropriate include those related to basic management skills such as interviewing techniques, time management, team development, and dealing with personnel issues.

The director of Professional Development should be responsible for investigating and coordinating the professional development applicable to the various staff groups. As part of this process, the director should conduct a needs assessment with district and campus leaders to solicit staff input into which areas of leadership development are the most needed and appropriate. This recommendation can be implemented with existing resources.

COMMUNITY INVOLVEMENT PLAN (REC. 7)

MISD lacks a coordinated district community involvement plan. MISD's community involvement program, according to the superintendent, is in its infancy. Its major existing component revolves around the support services the district provides through the Student and Family Support Services (SFSS) Department. Campus community involvement activities are implemented and managed at each campus

individually with little or no coordination among campuses or guidance and monitoring at the district level. The success and effectiveness of the community involvement activities vary from campus to campus based on each principal's interest and involvement, and on the initiative and dedication of parents. At some campuses, the Parent Teacher Organization (PTO) has a large membership, is very active, and provides "a lot of support" for teachers through fundraisers and volunteering. At other campuses, the PTO generates little interest, is not representative of the school demographics, and involves a small group of parents; these campuses typically have little support from campus administrators for parent/community activities.

On the MISD website, the "Community" link brings up information on the Manor Education Foundation; the district's College Connection partnership with Austin Community College; the district's diversity mission statement and diversity calendar; the 2006, 2007, and 2008 bond projects; and Project Mentor. There is no information on this web page about basic community involvement activities available in the district.

An additional example of the lack of district-level guidance as related to community involvement in MISD is the district's volunteer program. MISD does not have formal procedures for recruiting, screening, training, and monitoring campus volunteers. Each campus uses different strategies to recruit and monitor volunteers, and the district and the campuses do not track or share volunteer information. The campus success rates in recruiting volunteers vary. Generally, MISD teachers, district administrators and support staff, and principals and assistant principals indicated that schools do not have enough volunteers. However, MISD is planning to standardize and centralize the volunteer function and is in the process of designing a standard volunteer form for use throughout the district. The Human Resources Department will screen the completed forms and volunteers will have to undergo training prior to participating in volunteer activities. Each campus will have a Volunteer Coordinator and the district will keep records on all volunteers.

Awareness of the need for district-level coordination of community involvement activities is growing. In 2008–09, MISD included a community involvement goal among the seven district goals. Goal 5 – "Build strong partnerships between schools, parents, and community" includes four strategies to accomplish this goal:
- Provide opportunities for parents and students to get involved in their school and community; and provide

parents with educational information and resources that are available to them.
- Increase communication with parents and community members.
- Launch customer service initiative.
- Develop collaborative partnerships with Manor ISD and businesses.

In recent years, MISD has begun to initiate districtwide parent and community involvement activities. These activities include:
- The superintendent formed a district Parent Teacher Organization (PTO) to work in tandem with school PTOs. The district PTO meets periodically but does not yet have a plan or operational procedures.
- The superintendent and central office administrators have increased parent-community dialogues. MISD staff meets with parents to discuss the district goals, district improvement plans, new programs, after school programs, and the bilingual program. The meetings are publicized on the home page of the district website, in the Manor newspaper, in letters to parents, and through the district's automated calling system. Attendance has been low at these meetings thus far, but is improving.
- MISD created a District Advisory Team (DAT) that worked on formulating the district goals and the district improvement plan.
- The district initiated a Customer Service survey in 2007–08 to get input from parents, community members, and employees on how the district is doing. In 2007–08, the survey was online and yielded only 70 responses. In 2008–09, customer service feedback forms in English and Spanish were available at each campus. The form inquired into how courteous, helpful, and knowledgeable MISD staff was and how satisfied the customer was with the service he/she had received from MISD staff. The responses were analyzed monthly. At the time of the review in March 2009, the district had received 200 responses. Based on the responses, the district recognized several district employees and realized that it needed to conduct an office and clerical staff training on how to interact with parents and the public. The 3-hour training was conducted in October 2008 and addressed the characteristics of good customer service,

its importance and benefits, district expectations regarding customer service, phone and email etiquette, and confidentiality. Based on customer service survey comments, the district also plans to conduct a similar training for administrators in summer 2009.

- The superintendent and assistant superintendent attend different neighborhood association and chambers of commerce meetings to represent MISD and inform the community about district goals and initiatives.

- Beginning in spring 2009, board meetings will be held at different campuses four times yearly to draw greater attendance of parents and community members living near the respective school.

- The district plans to establish parent centers on all campuses to get parents more involved in the schools.

- The district has strong partnerships with the Manor Chamber of Commerce and a large number of local businesses and large technology companies such as Applied Materials, Samsung Semiconductor, and Dell Computers. The Student and Family Support Services Department coordinates the partnerships through the Partners in Education program.

While MISD has begun to initiate some districtwide parent and community involvement activities, it has done so without an overarching vision, district-level coordination, articulated priorities, a timetable, or a formal mechanism for planning and organizing these activities. MISD lacks a parent and community involvement plan that will guide programs and initiatives, set priorities, specify strategies, identify personnel responsible, define procedures and expected measurable outcomes, and specify resources needed to ensure accountability.

MISD should develop a coordinated district community involvement plan. A coordinated plan will bring focus and structure to community involvement activities, and is critical for the district as it embarks on expanding its community involvement initiatives. The plan should address the coordination of the different programs at the district-level and specify strategies for assisting and supporting campus community involvement efforts. The plan should align with the community involvement goal and strategies that are found in the 2008–09 district improvement plan.

The assistant superintendent for Administration and Human Resources should work with the director of Student and Family Support Services to develop the community involvement plan with input from the superintendent, other district administrators, campus administrators, PTO representatives, and community members. Once the plan is developed, it should be presented to the school board for approval. Implementation of the plan should occur through the Student and Family Support Services Department. This recommendation can be implemented with existing resources.

MISD WEBSITE – PARENT AND COMMUNITY INFORMATION (REC. 8)

MISD's district and campus web pages are underdeveloped with regards to parent and community information. Although the district website has a community page, the page has little information. The MISD community web page showcases the Manor Education Foundation and provides contact information for it as well as several entities and programs including the Student and Family Support Services Department and Project Mentor. Occasionally, the district web page has information on community-related events such as a community meeting on the home web page or under the MISD News web page.

The district website has links to each of the campuses, but campus web pages lack information for parents and community members. For most campuses, the home page does not have any references to parent and community pages. As of March 2009, the Decker Middle School home web page had a Parent & Student Resources web page, but it had little information, and its PTO News and Calendar page is under construction. Presidential Meadows Elementary, which has a more developed website, referred to a Parent Information page, but its Parent Involvement Policy and Involvement Activities and Dates links are not functional.

Although MISD has a large Spanish-speaking population, the district website and eight of the 11 school web pages have little or no information in Spanish. The three campuses that have some parent and community information on their websites have very limited information in Spanish. Presidential Meadows Elementary has the school newsletter in Spanish, and the Blake Manor Elementary website has the Parent Compact in Spanish. Decker Middle School has the welcome letter in English and Spanish. During focus groups conducted at the time of onsite work in March 2009, MISD parents complained that the district and school websites are not

updated frequently, that information published about events is not complete, and that the information published on the website is not reviewed for accuracy, as parents occasionally found misspelled words on the district and campus web pages.

MISD is not effectively using its websites to communicate with parents and community members. Websites can be useful and cost-effective tools for school districts and schools to reach out to parents and the community at large. Web pages can be easily updated and offer current up-to-date information and communications. Web pages can also help create a positive and caring image of the district and the respective schools.

Clint ISD has an informative Parent and Community web page. The web page has a wide range of information for parents and links to important resources. It provides access to issues of the district newsletter, a link to TEA's Parent Involvement & Community Empowerment, a calendar of district activities, the district Parental Involvement Plan in English and Spanish, and the latest issue of the newsletter for Parents in English and Spanish.

MISD should develop Parent and Community web pages for the district and campus websites. Both district and campus Parent and Community web pages should contain up-to-date information describing the different initiatives, programs, and activities available to parents and community members. For example, the web pages should have information on district and campus meetings, issues discussed and resolutions made at such meetings, district and campus PTO activities and accomplishments, district meetings with parents, copies of correspondence sent home to parents with students, and other school-related items. The web pages should be used to keep the parents and the community well informed about the district and respective campuses, recruit parents and community members to volunteer in schools, and create a positive image of the district. As often as possible, the information should be presented in both in English and Spanish. This recommendation can be implemented with existing resources.

FISCAL IMPACT

RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
1. Consider revising the administrative organization structure to ensure a balance of responsibilities among district leaders.	$0	$0	$0	$0	$0	$0	$0
2. Develop a comprehensive strategic plan that links the district's goals and objectives to the budget.	$0	$0	$0	$0	$0	$0	$0
3. Develop a process to ensure that new board members receive their local district orientation within a timely fashion as required by the TAC and district policy.	$0	$0	$0	$0	$0	$0	$0
4. Transfer all board administrative support duties to the board secretary.	$0	$0	$0	$0	$0	$0	$0
5. Restructure the format of school board meetings to encourage parent and community involvement.	$0	$0	$0	$0	$0	$0	$0

FISCAL IMPACT (CONTINUED)

RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
6. Ensure that all district and campus administrators regularly participate in professional development activities focused on leadership development.	$0	$0	$0	$0	$0	$0	$0
7. Develop a coordinated district community involvement plan.	$0	$0	$0	$0	$0	$0	$0
8. Develop Parent and Community web pages for the district and campus websites.	$0	$0	$0	$0	$0	$0	$0
Totals	**$0**	**$0**	**$0**	**$0**	**$0**	**$0**	**$0**

CHAPTER 2

EDUCATIONAL SERVICE DELIVERY

MANOR INDEPENDENT SCHOOL DISTRICT

CHAPTER 2. EDUCATIONAL SERVICE DELIVERY

Manor Independent School District (MISD) has experienced high growth in the past five years, with the number of students increasing from 3,828 in 2004–05 to 6,327 in 2008–09—a 65.3 percent increase. To address the growth, MISD increased its number of campuses to 11, adding a high school in 2007 (Manor New Tech); three elementary schools, Blake Manor in 2006, Presidential Meadows in 2007, and Oaks Meadows in 2008; and a middle school in 2007 (Decker Middle). The district plans to open Pioneer Crossing Elementary in 2009–10.

MISD is a predominantly minority district. In 2007–08, MISD students were 57.5 percent Hispanic, 26.8 percent African American, and 13.6 percent Anglo. Approximately 68 percent of MISD's students were economically disadvantaged, 58.3 percent were at-risk, and 26.0 percent were limited English proficient (LEP).

MISD received an *Academically Acceptable* rating for 2007–08 from the Texas Education Agency (TEA). During that school year, one campus received a *Recognized* rating, six received an *Academically Acceptable* rating, two received an *Academically Unacceptable* rating, and two were new and were not eligible for an accountability rating from the state.

Under the accountability provisions in the No Child Left Behind Act, all public school campuses, school districts, and the state are evaluated for Adequate Yearly Progress (AYP). MISD's final 2008 AYP results indicate that the district *Missed AYP* due to Reading and Math performance, as well as their graduation rate. Three campuses also *Missed AYP*, one due to Reading and Math performance and Math participation, another due to Math performance, and the third due to Reading performance. All other MISD campuses either *Met AYP* or were *Not Evaluated*.

Exhibit 2-1 shows the organizational chart of MISD's instructional services for 2008–09.

EXHIBIT 2-1
MISD INSTRUCTIONAL SERVICES ORGANIZATIONAL CHART
2008–09
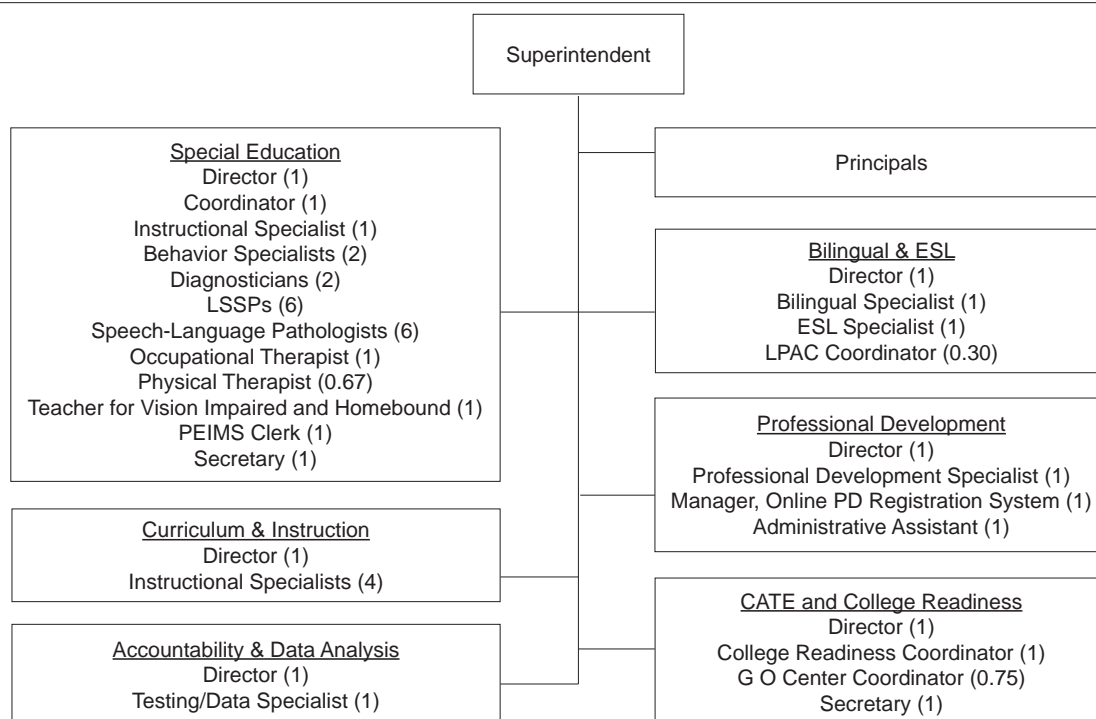
SOURCE: MISD Instructional Services Organization Chart, 2008–09.

ACCOMPLISHMENTS

- MISD has a well-planned and implemented comprehensive data analysis system that generates multiple detailed reports for administrators, principals, and teachers to guide instruction and assess accountability.

- MISD has established multiple instructional accountability tools at the district and campus level to monitor and improve instruction.

- Manor New Tech High School—a Texas Science, Technology, Engineering, and Math (T-STEM) academy—has achieved success with its technology integrated, project-based instructional approach.

- MISD has a well organized, comprehensive, and targeted professional development system.

FINDINGS

- The Manor Curriculum Alignment Plan (MCAPS) is not fully and consistently developed, does not cover all subject areas, is not user friendly, and is difficult to update or revise.

- MISD's locally developed curriculum-related assessments are not well-aligned to the curriculum.

- Gifted and Talented instruction through in-class differentiation strategies is not consistently or effectively implemented in MISD.

- MISD does not have a comprehensive program evaluation system.

- Technology is not integrated into the MISD curriculum or into classroom instruction districtwide.

- MISD's alternative education programs do not provide effective instructional and support services to meet student needs.

- MISD does not enforce immunization compliance at Manor High School.

- MISD's library staffing practices are not consistent with the Texas State Library and Archives Commission (TSLAC) standards, and librarians spend little time instructing students.

- MISD's library collections are not consistent with the Texas State Library and Archives Commission (TSLAC) standards.

RECOMMENDATIONS

- **Recommendation 9: Fully develop, monitor, review, and update the curriculum for all subject areas and grade levels based on a revised district curriculum management plan.**

- **Recommendation 10: Improve the alignment of the six-week assessments with the curriculum taught during the respective six-week period.**

- **Recommendation 11: Facilitate and ensure the use of consistent and effective differentiated instruction for all G/T students.**

- **Recommendation 12: Develop and implement a program evaluation system ensuring that all district programs are evaluated for effectiveness on a regular basis.**

- **Recommendation 13: Expand access to technology and integrate technology into the curriculum and instruction districtwide.**

- **Recommendation 14: Evaluate the effectiveness of educational services provided by the district's alternative education programs.**

- **Recommendation 15: Enforce immunization compliance districtwide.**

- **Recommendation 16: Ensure that all campus libraries maintain consistency with the TSLAC *Acceptable* staffing levels, and review campus schedules to ensure librarians are providing student instruction.**

- **Recommendation 17: Evaluate library collection sizes and budgets, and develop strategies to ensure all libraries meet the TSLAC *Acceptable* standard.**

DETAILED ACCOMPLISHMENTS

DATA ANALYSIS AND ACCOUNTABILITY

MISD has a well-planned and implemented comprehensive data analysis system that generates multiple detailed reports for administrators, principals, and teachers to guide instruction and assess accountability. MISD's Accountability and Data Analysis Department consists of a director and a data specialist. The district's emphasis since 2005 on the use of data to drive instruction in a focused way has increased the importance of the role of the department. The department produces a series of reports each year that provide

administrators and teachers with an in-depth understanding of the accountability systems and detailed data that affects their instruction.

- The department prepares several reports that explain accountability to teachers and the relationship between the state Academic Excellence Indicator System (AEIS) and federal Adequate Yearly Progress (AYP) accountability systems. The reports are tailored to elementary and secondary teachers and include assessment choices for special education students by grade level and subject area. The reports include *Elementary Teacher Introduction to Accountability, Secondary Teacher Introduction to Accountability,* and *Dueling Accountability: AEIS vs. AYP.*

- The *Assessment and Accountability Update* report provides an update of changes in the state accountability system (AEIS), the federal accountability system (AYP), and the Student Success Initiative. In addition, the report provides a multi-year graphic history of performance by subject area and student population for the district overall and for each of the schools.

- The *Academic Excellence Indicator System & Adequate Yearly Progress* report is prepared annually and explains the AEIS report structure, data, and accountability standards for each subject area. It highlights the accountability ratings for the district and for each of the schools and presents Texas Assessment of Knowledge and Skills (TAKS) student performance data by subject area. The report also highlights dropout and graduation rates and MISD student performance on the SAT and ACT college entrance exams. The report presents the AYP process and profiles MISD's AYP status. In addition, the report includes the AEIS and AYP reports for the district and for each of the schools.

- The department prepares two *Mid-Year Benchmark Data* reports; one for elementary and one for middle schools. The reports consist of a comprehensive analysis of the benchmark data down to the teacher and individual student levels. The data are analyzed by each six-week period, across two years, and by student population. The reports also compare benchmark test results with TAKS results, profile overall student data trends, provide homeroom teacher comparisons, and include a CD with individual student scores.

- The *Six Weeks Assessment Data* report is prepared at the end of each six-week period. The report is similar in content to the *Mid-Year Benchmark Data* report and provides a detailed analysis of the assessment results at the school, homeroom teacher, and individual student levels. Individual student scores are provided on a CD. The report gives information to each teacher on the aggregate performance of his/her students as well as on how each individual student performed. Aggregate student performance is divided into five score categories and is shown as the percentage of students scoring 0 to 39 percent, the percentage scoring 40 to 54 percent, the percentage scoring 55 to 69 percent, the percentage scoring 70 to 84 percent, and the percentage scoring 85 to 100 percent.

- The *Texas Assessment Results: TAKS – TELPAS District Summary Reports – Preliminary Results* report provides detailed analysis of three assessments: TAKS, TAKS Modified (TAKS-M), and the Texas English Language Proficiency Assessment System (TELPAS). The TAKS results are shown over a six-year period districtwide, by subject area, grade level, campus, for all students, and for 11 student subpopulations. The student subpopulations consist of four ethnic/racial groups, economically disadvantaged, LEP, bilingual, English as a Second Language (ESL), special education, talented and gifted (TAG), and at-risk. The report also includes analysis of the TAKS average scale scores.

The Accountability and Data Analysis Department provides extensive training to teachers in order for them to gain an understanding of the accountability systems and reports the department produces as well as in the use of the district's web-based data management system, which allows teachers to access and analyze assessment data for their students. To address the need for assistance with daily tasks related to data management by teachers, the department prepared a manual for the web-based data management system. The department is also planning to train instructional specialists on each campus in the use of the data for instruction. The instructional specialists will, in turn, help teachers understand the assessment results for their students and develop instructional strategies to effectively address gaps and areas of weaknesses.

Based on the extensive analysis of TAKS, benchmark, and six-week assessments, the department prepares a *Campus Performance Improvement* binder for each principal. The purpose of the binder is to document to principals the

academic performance of their campus and help them develop appropriate goals for continuous student improvement. The binder includes the accountability standards for AEIS and AYP, and an explanation of Expected Performance Improvement (EPI), Commended Performance Improvement (CPI), and Campus Performance Goal (CPG). It also has the AEIS data tables and graphs, preliminary TAKS results for the district and respective campus, TAKS data analysis by subpopulation, the campus EPI, the campus CPI, and the campus TAKS failure reduction goals. Principals receive their *Campus Performance Improvement* binder during the first week of August. Each principal meets with the superintendent prior to the start of school to review the performance of his/her campus and set goals.

To increase principals' understanding and use of the data to guide instruction, the department offered a full day workshop in summer 2008 on "Data Driven Decisions." A Regional Education Service Center XIII (Region 13) data expert taught the workshop and helped principals to understand how to use their campus data to develop strategic instructional decisions for the coming year for their campus.

INSTRUCTIONAL ACCOUNTABILITY TOOLS

MISD has established multiple instructional accountability tools at the district and campus level to monitor and improve instruction. These tools include Checkpoints, Learning Through Instructional Reflection (LIR), and Instructional Leadership Team (ILT) meetings.

The purpose of the Checkpoints system is to ensure that principals and teachers analyze their students' six-week assessment results; address areas of academic weakness identified through these assessments; and are effectively meeting the academic needs of their students. The system includes a yearly schedule of campus-specific meetings which take place after the administration of the six-week assessment and analysis of the results. At the end of each six-week period, the Checkpoints Team meets with each campus principal and his/her Campus Advisory Team (CAT) to analyze test data in order to identify areas of student and teacher need. The superintendent, assistant superintendent, and the instructional program directors (i.e., Curriculum and Instruction, Bilingual/ESL, Special Education, Professional Development, Accountability and Data Analysis, and Information Technology Services) participate in the 90-minute meetings with respective principals and their CATs.

MISD has developed a set of guiding questions for the meetings, which are provided to principals at the beginning

of the school year. The guiding questions address the actions and interventions that a school will take as a result of the analysis of students' performance on the assessments, the staff involved in the response, the strategies and initiatives that were successful in the school in improving student achievement, and the support that Central Office can provide to the school. The Checkpoints Team uses a rubric to determine whether the school has adequately disaggregated the data to identify critical student needs; put in place interventions to meet the needs of all students identified as needing improvement; has teams and departments working together to address the needs of the struggling learners; and has a plan of action, including professional development and needed resources. If there are gaps in the preparedness of the principal and the CAT for the meeting, a follow-up meeting may be scheduled.

Instructional Leadership Team (ILT) meetings are another strategy that MISD has implemented to share information and keep members of the ILT informed about instructional issues districtwide. ILT meetings are also a venue through which principals receive and deliver professional development on specific topics. The ILT consists of the superintendent, assistant superintendent, principals, the director of Curriculum and Instruction, instructional specialists, the director of Accountability and Data Analysis, the director of Professional Development and specialist, the coordinator of Federal and State Programs, and instructional program directors and specialists including Bilingual/ESL, Special Education, Instructional Technology, and Career/College Readiness and Guidance. The team meets monthly for three and a half hours, each time at a different school. At the beginning of the school year, the director of Curriculum and Instruction and the superintendent determine the topics to be addressed at each meeting. The topics reflect district needs. Based on the topics selected, the director of Curriculum and Instruction assigns the location of each meeting to campuses that may excel in specific areas so that campus administrators and staff can share best practice information with the ILT members. For example, the meeting to discuss Instructional Systems was set at Bluebonnet Trail Elementary because the school has a record of successful student performance; Bluebonnet Trail Elementary is the only *Recognized* school in the district.

Exhibit 2-2 shows the ILT meeting structure and topics addressed for 2008–09.

Following the ILT meeting, team members conduct walkthroughs on the respective campus. Each ILT member

EXHIBIT 2-2
INSTRUCTIONAL LEADERSHIP TEAM MEETING SCHEDULE, TOPICS, AND STRUCTURE
2008–09

DATE	LOCATION OF MEETING	PRIMARY FOCUS (INSTRUCTIONAL CONCEPT)	SECONDARY FOCUS (CONTENT AREA)
Sept. 17	Bluebonnet Trail Elementary	Instructional Systems	N/A
Oct. 22	Blake Manor Elementary	Interventions	Reading
Nov. 19	Manor High	Data Analysis	Math
Dec. 17	Manor New Tech High	High-Yield Instructional Strategies	English (Writing)
Jan. 28	Decker Middle	Team Planning	English (Grammar)
Feb. 18	Manor Elementary	Inclusion Model	Math
Mar. 11	Manor Middle	Integrated Technology	Science
April 1	Presidential Meadows Elementary	SSI Intervention Plans	Reading
May 13	Oak Meadows Elementary	Differentiated Instruction	Social Studies

Meeting Time: 8:00 AM – 11:30 AM

MEETING FRAMEWORK

I. Best Practice – Instructional Concept and/or Content Area: Andrew Kim

II. Best Practice: Campus Principal

III. Learning Through Instructional Reflection (LIR)

IV. Debrief: Small Group/Share Out

V. Next Steps

VI. Lunch

SOURCE: MISD director of Curriculum and Instruction, April 2009.

visits two to three classrooms and completes a reflection form for each classroom visited. The ILT then meets in small groups and as a whole, and discusses the observations and next steps. The walkthroughs are structured and based on the Learning Through Instructional Reflection (LIR) methodology. The purpose of the walkthroughs is to focus on positive classroom observations such as quality instruction and successful classroom management as well as identify areas of concern. The director of Curriculum and Instruction sets up a schedule at the start of the school year and sends the schedule to all principals. The schedule consists of four annual 90-minute visits to schools. The LIR walkthroughs have a theme or focus, such as student engagement and instructional rigor. LIR team members use a reflection form and record the visit's instructional focus, observations, reflective questions, and teacher responses. The principal of the school visited get a debriefing and a copy of the reflection forms completed for the teachers/classrooms visited. LIR has proven to be an effective way to identify districtwide classroom instruction problems. For example, during the first round of LIRs conducted in September and October 2008, it became apparent that student engagement in classrooms was low. The LIR Team, whose membership is the same as that of the ILT, formulated strategies and next steps

to improve student engagement and asked principals to make student engagement a priority instructional focus. Subsequent LIRs have shown improvements in this area.

MANOR NEW TECH HIGH SCHOOL

Manor New Tech High School (MNTHS), a T-STEM academy, has achieved success with its technology integrated, project-based instructional approach.

MNTHS opened in August 2007 with 160 students. The school, a Texas Science, Technology, Engineering, and Math (T-STEM) academy, focuses on these four subject areas. The goal of MNTHS is "to prepare students to excel in an information-based and technologically-advanced society." The school is built on the New Technology Foundation (NTF) model of project-based learning and is strikingly different from a traditional high school. The New Technology Foundation, established in 1999 with the goal of reforming education, is a school development organization that supports the start-up and implementation of 21st Century high schools that follow the Napa New Technology High School model. Currently, more than 40 schools nationally are members of the New Technology High School Network. The NTF model revolves around project-based learning. Project-

based learning is student-driven, engaging, and meets the needs of a wide variety of academic abilities. Project-based learning involves teams of students that are given a driving question or an authentic problem that challenges them to find new information and apply it to real world situations. Project-based learning leads to high level learning by recognizing the relevance of the content students study. MNTHS uses project-based learning through collaboration with peers, businesses, and the community.

MNTHS staff consists of a principal, a counselor, 22 teachers, two master teachers, and two front office staff. More than half of the teachers have graduate degrees. Teachers meet weekly on Monday morning from 8:00 to 10:30 to review best practices, showcase technology tips, and explore integrated cross-curricular projects aligned to the TEKS. Most of the teachers co-teach across two or more subject areas in the same classroom. Interdisciplinary classes may combine algebra, physics, and chemistry or world geography and world literature.

MNTHS students were selected in a blind lottery from among district applicants. The student body is diverse, reflecting the district's demographic and socio-economic profile **(Exhibit 2-3)**. In 2007–08, MNTHS had a total of 157 students in 9th (109) and 10th (48) grades. The student population was composed of 46.5 percent Hispanic, 23.6 percent African American, and 28.7 percent Anglo students. More than half of the students were economically

EXHIBIT 2-3
MANOR NEW TECH HIGH SCHOOL STUDENT PROFILE 2007–08

	NUMBER	PERCENT
Total number of students	**157**	**100.0%**
African American	37	23.6%
Hispanic	73	46.5%
Anglo	45	28.7%
Asian/Pacific Islander	*	1.3%
Economically disadvantaged	85	54.1%
Limited English Proficient	8	5.1%
At-risk	69	43.9%
Special education	12	7.6%
Gifted & Talented	23	14.6%
ESL	6	3.8%

*Numbers less than five have not been cited due to the Family Educational Rights and Privacy Act (FERPA) 34CFR Part 99.1 and Texas Education Agency procedures OP 10-03.
SOURCE: Texas Education Agency, Academic Excellence Indicator System (AEIS), Manor New Tech High School, 2007–08.

disadvantaged and more than 40 percent were at-risk; 7.6 were in special education and 3.8 percent in ESL. All LEP and special education students receive instruction in the classroom with individualized academic support as appropriate. MNTHS expanded its enrollment in 2008–09 to 225 students, including 40 in 9th grade, 95 in 10th grade, and 90 in 11th grade.

The MNTHS curriculum, based on the state's learning standards, the Texas Essential Knowledge and Skills (TEKS), brings together technology, problem solving, interdisciplinary instruction, and community and business partnerships. MNTHS offers students hands-on collaborative learning in a small learning community, as students work individually and in small groups in the project-based learning environment. Students apply their knowledge through team projects, modeling real-life work situations, job assignments, internships, peer reviews, and connections to college, career, and community experiences. The learning outcomes they seek include technology literacy, global and community engagement, work ethic, written and oral communication skills, critical thinking, collaboration, and numeracy skills. Through project-based learning, students develop problem-solving skills, interpersonal skills, and the resiliency to succeed in a highly competitive environment.

Students can graduate under either the Recommended or the Distinguished High School Program. In addition to the traditional curriculum, students are required to complete an Engineering course sequence. They can select among elective courses such as Digital Media, Technical Auto CAD, Video Technology, Technical Writing, and Final Cut Pro student certification. Students are required to complete 50 hours of community service beginning their junior year, participate in an internship during their senior year, and pass all four TAKS exit level exams. In addition, MNTHS students are able to earn 12 credits through the Early College Start program.

MNTHS students performed well academically on the TAKS in 2007–08. Although MNTHS received an *Academically Acceptable* state accountability rating, MNTHS students exceeded the performance of the district in both grade levels and in all subject areas. Additionally, MNTHS students met or exceeded the state average in all subject areas. MNTHS student performance was especially strong in science, where students scored 15 percentage points above the state average **(Exhibit 2-4)**.

The technology infrastructure at MNTHS is anchored by a 12GB fiber backbone utilizing 2GB bandwidth network

EXHIBIT 2-4
MANOR NEW TECH HIGH SCHOOL TAKS PERFORMANCE
2007–08

SUBJECT	MANOR NEW TECH HIGH SCHOOL	MISD	STATE
GRADE 9			
Reading	88%	74%	87%
Mathematics	64%	44%	64%
All Tests	63%	41%	63%
GRADE 10			
English Language Arts	96%	79%	89%
Mathematics	78%	45%	66%
Science	80%	46%	65%
Social Studies	95%	75%	89%
All Tests	69%	33%	55%

SOURCE: Texas Education Agency, AEIS, Manor New Tech High School, 2007–08.

connection that provides direct network access to all classrooms and administrative offices. Wireless access throughout the campus supplements the connectivity. Computers are available to every student in every class, including both desktop computers and laptops, which provides a student-to-computer ratio of 1:1.

Technology is seamlessly integrated into all subject areas at MNTHS. Instructional technology tools available include iPods, digital and high definition cameras, video editing software, interactive whiteboards, and projectors. The school has a central media room where students and teachers can present their projects. Students present their projects to other students, teachers, and panels of community experts. Student work is kept in digital portfolios throughout their high school career.

The business community participates in the school in a variety of ways, including serving on expert panels observing and listening to student project presentations and through funding. MNTHS has a wide range of foundation, university, and business partners **(Exhibit 2-5)**.

In November 2008, the New Technology Foundation designated MNTHS a Certified 21st Century School, testimony to its success and accomplishments. As a certified school, MNTHS will be able to participate in research studies and speaking opportunities in educational and public arenas. The certification is also an important designation for students when they apply to college. In April 2009, MNTHS was designated as an Apple Distinguished School. The campus

EXHIBIT 2-5
MANOR NEW TECH HIGH SCHOOL PARTNERS
2008–09

Bill and Melinda Gates Foundation	Austin Community College
Michael and Susan Dell Foundation	Huston-Tillotson University
Wallace Foundation	University of Texas
New Technology Foundation	University of Texas Dana Center
Samsung Semiconductor	Regional Education Service Centers 13 and 20
Applied Materials	Texas Education Agency
Freescale	T-STEM Initiative
Skillpoint Alliance	Texas High School Project
MindHo	Office of the Governor
Bob Pearlman	Rapport International Leadership
United Way	Margaret Kilgo Data Research

SOURCE: Manor New Tech High School website, April 2009.

became one of 33 schools in the country to have received this designation from Apple, which recognizes campuses for their success in implementing a 21st Century learning environment.

PROFESSIONAL DEVELOPMENT

MISD has a well organized, comprehensive, and targeted professional development system.

Professional development is centrally managed through the district's Professional Development Department, which is comprised of a director, a professional development specialist, a manager of the online professional development registration system (E-class), and an administrative assistant.

The MISD Professional Development Department uses an online system for professional development registration. The system has a professional development calendar and tracks administrator, teacher, and staff participation by campus and subject area, allowing the district to identify gaps for certain personnel or campuses and address those gaps as appropriate. Prior to the hiring of the current director of Professional Development in July 2007, the district used a spreadsheet to track professional development completed by staff. The spreadsheet had limited data and was not always accurate.

The online system also solicits feedback from each participant on the professional development session the participant took. Participants cannot get a certificate for their professional development sessions without completing a feedback survey.

The survey consists of 10 statements the participant rates on a 5-point Likert scale, ranging from Strongly Agree to Strongly Disagree. The statements address whether the professional development session:

- is likely to have a positive effect on student achievement;

- was effectively communicated;

- is aligned with district goals and expectations;

- would improve the participant's job performance;

- would improve the participant's level of understanding;

- was appropriately structured;

- was presented by a knowledgeable presenter;

- was led by an engaging and motivating presenter;

- left the participant with a clearly conveyed message from the presenter; and

- will be recommended to others by the participant.

The overarching goal of MISD's professional development program is increased academic performance. MISD determines professional development needs based on the analysis of TAKS and district benchmark test data, teacher retention data, and district and campus improvement plans. The professional development agenda also takes into consideration administrator, teacher, and staff requests. For example, the needs assessment for 2008–09 resulted in four professional development focus areas: math and science, content area reading, differentiated instruction, and teacher retention. Eighty percent of the professional development focuses on district and campus needs; 20 percent is based on teacher interests or requests and National Staff Development Council recommendations. The Professional Development Department tries to accommodate all requests. The theme for the 2009–10 professional development agenda is "Enriching Instruction in a Culturally Diverse Environment."

MISD has developed and is implementing several strategies to target professional development to specific needs. Each professional development course is differentiated by level. Level 1 is targeted at the novice teacher or administrator; level 2 is the apprentice level, and level 3 is for the expert. In 2008–09, MISD offered professional development courses at levels 1 and 2. To ensure that participants take the appropriate level course, they must obtain the approval of the principal or supervisor prior to registering for a professional development session.

The district has a long-range professional development plan. MISD is in Phase II of the plan, where each teacher will have an individualized professional development plan. These teacher learning plans are based on the analysis of their students' performance. The district believes that identifying the professional development needs of each teacher and responding to those needs will also improve teacher retention.

To build campus and district capacity of teachers qualified to deliver professional development, MISD will begin the Leadership in Educational Excellence Program (LEEP) in 2009–10. The program will involve a cohort of 20 teachers who have shown strong leadership as mentors and professional development providers. These teachers will be awarded a stipend of $1,000 funded through Title II, Part A, to prepare and deliver a minimum of four professional development sessions per year (June to June); videotape one classroom session and a subsequent reflective conference with district personnel per semester; mentor staff; maintain 30 hours of personal professional development per year; and attend monthly LEEP meetings. In summer 2008, MISD used its instructional specialists to provide professional development; it will use its master teachers in summer 2009.

To ensure consistency and quality of professional development that district personnel and teachers provide, MISD developed a Presenter's Handbook. The Presenter's Handbook defines expectations for professional development facilitators including setting up the session, how to open a session, procedures for managing the session, and closing the session. It specifies professional development norms and informs facilitators about the professional development standards that the National Staff Development Council set. Each facilitator is required to complete a planning document with information on the title of the class, target audience, expected number of participants, a description of the class, and an agenda.

MISD provides professional development in different formats throughout the year and in the summer. Professional development is offered every Thursday afternoon of the fall semester until the end of December. Beginning in January, district after school tutorials take the place of professional development. MISD provides a large volume of professional development. According to district data, administrators, teachers, and staff attended 4,457 hours of professional

development between November 12, 2007 and December 31, 2007; 48,176 hours between January 1 and December 31, 2008; and 3,708 hours between January 1 and January 31, 2009.

MISD provides a wide range of professional development at the start of the school year, throughout the year, and during the summer. Before the start of school, MISD offers five days of "Back to School Professional Development." These sessions include two campus professional development days, two district professional development days, and one teacher prep day. In addition, the district offers five professional development days throughout the year. In summer 2008, MISD offered seven half-day, full-day, and two-day mandatory sessions for district and campus administrators on subjects such as Legal Updates, Accountability and Beyond, a Policy Review seminar, Technology Tips and Tools for Administrators, Data Driven Decisions, Creating More Powerful Designs for Professional Learning, and a leadership retreat. MISD also offered more than 30 half-day and full-day sessions for teachers. Information on each session specifies the target audience (e.g., all teachers, subject-specific teachers, grade-specific teachers). MISD also offered a two-day boot camp for new teachers and a one-day session for all teachers new to MISD. In addition, the district offered a four-day new teacher orientation week. In summer 2009, MISD plans to offer a four-day institute for new teachers during the last week of July. Session topics in 2008–09 included content area reading, teacher preparation, TAKS preparation, and two campus-selected focus days.

In addition, the annual Professional Development Catalog that the Professional Development Department publishes is highly informative. For each professional development class listed, the catalog provides information on the title, whether the class is mandatory, the type of credit participants can get, the target audience, the content of the class, the contact person, date, time and duration, and location. The catalog not only provides class information, but also identifies the classes aligned with the district professional development focus area, and lists and describes the classes in each focus area: math and science, literacy, differentiated instruction, and teacher support. The catalog also has a list and description of professional development classes aligned with teacher interests and additional needs.

MISD has a 30-member Professional Development Planning Committee. Committee members include program directors, district and campus administrators, master teachers, teachers, instructional coaches, instructional specialists, and a board

member. The committee meets three times per year, in November, February, and May. Committee members survey teachers on their respective campuses regarding professional development needs. The committee reviews the professional development plan and catalog for the coming year and helps to finalize it; discusses new programs such as the Leadership in Educational Excellence Program; and reviews professional development templates. The director of Professional Development presents the plans to the district's ILT. During the monthly walkthroughs conducted by the ILT, they check whether teachers are implementing what they have learned in professional development.

DETAILED FINDINGS

MANOR CURRICULUM ALIGNMENT PLAN – MCAPS (REC. 9)

The Manor Curriculum Alignment Plan (MCAPS) is not fully and consistently developed, does not cover all subject areas, is not user friendly, and is difficult to update or revise. MISD recognized the importance of a districtwide curriculum, and as such developed MCAPS through its participation in the Central Texas Curriculum Consortium, which began in summer 2004 and was led by Region 13. The development of MCAPS reflected the district's first steps in ensuring the alignment of the written, taught, and assessed curriculum.

MISD started using MCAPS in January 2006, and is in its third year of use in the elementary and middle schools. The curriculum is also used at MNTHS. In 2008–09, MISD stopped using MCAPS at Manor High School, instead using a curriculum brought to the campus by its new principal. MCAPS addresses the four core subject areas in elementary and secondary grades. MISD does not have curriculum guides for Music, Art, Health, and Physical Education, but plans to develop guides in these areas in 2009–10 using LEEP teachers and Curriculum and Instruction Department staff. MCAPS also does not address or integrate the Technology Applications TEKS, the ESL/English Language Proficiency Standards, or Advanced Placement (AP)/Pre-Advanced Placement (Pre-AP) and Gifted and Talented Advanced Learners (GTAL) extensions.

MCAPS is based on Student Expectations (SEs) and is organized into six-week sequences. In its third year, a typical MCAPS curriculum for a specific subject area, grade level, and six-week period consists of a list of SEs that are aligned with Skills. For each Student Expectation, the Summary Section of MCAPS consists of "Specifications (adjustments

to SE),” “Duration,” and “Academic Language.” MCAPS also contains a section of ”Related Student Expectations” that includes room for listing the “Previous Course,” “Next Course,” “Textbook Reference,” and “Teaching Strategies (best practices and pitfalls), Activities, and Accommodations.” In addition, MCAPS provides a link to “Resources.” While this structure allows a high degree of flexibility, it also creates a challenge requiring the user to identify, develop, and determine the duration of teaching each SE and Skill; specify any adjustments to the SE, and list pertinent Academic Language as well as the appropriate resources, teaching strategies, activities, and accommodations.

MISD Curriculum and Instruction Department administrators and staff expect the full development of MCAPS to take three to five years from initial implementation. **Exhibit 2-6** shows the MCAPS development cycle.

The onus of development and specification of MCAPS is on the instructional staff. This structure also makes the quality

of the curriculum dependent on the expertise and level of knowledge of the local developers. The open and flexible structure renders the curriculum a continuously developing and changing document. Not having a fully developed curriculum is particularly challenging for new and less experienced teachers, who constitute a high percentage of MISD teachers.

The Manor Curriculum Alignment Plan: A Strategy for Continuous School Improvement calls for a curriculum review at least twice per year in order to meet the MCAPS development objectives and timeline. The purpose of the review, conducted by the curriculum advisory teams from each core area and the instructional specialists, is to look at pacing, alignment, and resources, and guide the curriculum staff in revising and updating the curriculum documents. MISD has not followed this provision consistently, as MCAPS was reviewed twice in 2007–08, but not in 2008–09. Thus, MCAPS has not reached the stage of

EXHIBIT 2-6
MCAPS DEVELOPMENT CYCLE
2006–07 THROUGH 2010–11

YEAR	MCAPS DEVELOPMENT ACTIVITIES
Year 1: 2006–07	• Provide a structure for curriculum documents to exist and get a skeletal curriculum in place.
	• Hire specialists in core subjects trained in curriculum alignment and experts in instructional strategies.
Year 2: 2007–08	• Provide a complete curriculum for all core courses:
	o Specifications for each Student Expectation (SE) (scope)
	o Pre-requisite and post-requisite skills
	o Aligned resources
	o Pacing guide (sequence)
	• Train all professionals in alignment and assessment fundamentals. Begin to create a “culture of alignment and collaboration.”
Year 3: 2008–09	• Complete the curriculum document for all core courses:
	o Academic vocabulary for every SE with embedded ESL teaching strategies.
	o Assessment guidelines and item examples from both TAKS and district assessments with links to available assessment banks.
	o Teaching strategies and activities for every SE aligned to district resources and designed specifically for stakeholders.
	o Extensions for AP/Pre-AP/GTAL.
	o Intervention strategies and resources for tested SEs.
Years 3–5: 2008–09 through 2010–11	• Continue to add layers of complexity and refine the curriculum documents by improving the pacing guidelines and tightening alignment of resources and activities:
	o Continuous training of all Manor ISD staff in the practice and culture of alignment.
	o Feedback loops: Vertical Advisory Teams, Horizontal Articulation Teams, instant web-based feedback per SE online now.

NOTE: Prior to 2008–09, the district did not employ a director of Curriculum and Instruction; consequently, no monitoring of the MCAPS development cycle occurred until Year 3.
SOURCE: MISD Curriculum and Instruction Department, March 2009.

development it was expected to reach in its third year of use, according to the plan. A review of MCAPS documents found on the MISD website shows uneven levels of development and specificity/detail for different grade levels and subject areas. Some of the curricula list only the Skill and SEs, others specify the adjustments to the SEs and duration, and still others also have information in the "Academic Language" area. Some of the curricula have an accompanying list of resources. Typically, the MCAPS sections addressing Teaching Strategies, Activities, and Accommodations are blank. Moreover, the MCAPS does not have embedded ESL strategies or AP/Pre-AP and GTAL extensions.

MISD lacks a streamlined process and protocol for generating comments and suggestions for developing and updating the curriculum. Instead, it uses a wide range of processes for obtaining feedback on MCAPS, and it is provided continuously and in a variety of formats. Teachers meet weekly to talk about the curriculum and provide feedback. Some schools have developed their own feedback forms while others provide a summary of minutes. The director of Curriculum and Instruction e-mails principals asking about MCAPS-related concerns, questions, and suggestions.

Historically, the Curriculum and Instruction Department has organized teacher focus groups to discuss needed changes. Each May, representatives from each campus, grade level, and subject area have met with respective instructional specialists to make recommendations for curriculum changes. Lacking a consistent form for feedback and instructions on the level of detail suggestions should have, the feedback and suggestions provided vary greatly in clarity, relevance, and specificity. The instructional specialists and the teachers hired to work on the curriculum review the comments and suggestions provided and decide what additions or changes to make in the curriculum.

The Curriculum and Instruction Department does not have a protocol or procedures for translating the suggested needs for modification or actual modifications into a coherently articulated and clear text that can then be uploaded into the online MCAPS document after a review and approval by the director of Curriculum and Instruction. Instead, the Curriculum and Instruction Department has relied on the instructional specialists and on the content knowledge and level of expertise of teachers hired to make MCAPS changes to articulate and specify the actual content. Both MISD principals and teachers commented on the questionable appropriateness and quality of some of the changes and updates that have been made in MCAPS. Some teachers

indicated that the changes that were made replaced higher quality content and thereby made MCAPS a less useful document. Teachers were also uncertain as to why suggestions they have made were not included. The teachers were not aware of any process the Curriculum and Instruction Department uses to screen comments and suggestions. Without a set of criteria for screening comments and suggestions or specifications of evidence regarding the significance and impact of a suggested modification, the decision as to what additions or changes to make in the curriculum is largely left to the professional judgment of those personnel hired to modify the curriculum. Furthermore, it is unclear whether consideration is given during the curriculum updating process to the impact of the updates and changes on consistency across grade levels and subject areas.

Although instructional specialists indicated that they monitored the changes that teachers uploaded into MCAPS, there is no quality assurance process to review the changes that were made. Such a process has two purposes: (1) to ensure that all intended modifications were made and (2) that the modifications uploaded into the curriculum enhance the completeness and quality of the curriculum. MISD instructional specialists, principals, and teachers indicated that because it is technically difficult and very time consuming to make changes in MCAPS, some of the changes uploaded were not uploaded successfully and did not appear; also, some changes to the math and science elementary curriculum distorted the sequence.

In April 2009, after the completion of onsite work, a Curriculum Revision Process was established to provide for a formalized feedback process from teachers regarding the instructional sequence of MCAPS. The director of Curriculum and Instruction informed campus principals of the new process and the newly created Feedback Form via email, and directed principals to forward the information along to their teachers. In May 2009, instructional specialists began meeting with grade levels/department teams on each campus to review and discuss the forms and determine any clarification that might be needed in order to make the forms more effective. Review of the forms will occur in June 2009, prior to summer curriculum revision work. Final decisions regarding changes to the curriculum will be made after a review of the forms by the director of Curriculum and Instruction and a team of instructional specialists and selected teachers across grade levels and content areas. The district plans to use 23 teachers during summer 2009 to assist with

revisions to the MCAPS; these teachers will be paid $150 per day for five days of curriculum revision work. For 2009–10, MISD plans to have MCAPS feedback forms submitted by teachers at the end of each grading period. The district is also hoping to embed a feedback option into its new online curriculum management system.

MISD principals, teachers, and Curriculum and Instruction Department staff agreed that MCAPS is not user friendly. Some teachers indicated that the MCAPS scope and sequence leads to over-teaching or under-teaching of some concepts. According to one of the principals, teachers find MCAPS so overwhelming that this principal's school created its own reading and math curriculum. MCAPS has thus far not been a useful and usable tool that guides teachers in instruction and helps them improve student learning and academic performance. Consequently, during spring 2009, MISD began the process of investigating the acquisition of a curriculum and data management system that will help make MCAPS use easier. The selected system was presented to the board of trustees for approval at the May 2009 meeting. After approval of the system and completion of contract negotiations, the selected vendor will begin loading the MCAPS into the online system in summer 2009. The district's goal is to have the MCAPS for the first grading period of fall 2009 online by August 1, 2009. Staff training on use of the system will occur in summer 2009.

Galena Park ISD (GPISD) has an effective process for curriculum development and updating. The district provides comprehensive staff development in curriculum writing to ensure consistency, to make the guides teacher-friendly, and to incorporate resources and instructional strategies. GPISD has a consistent framework for curriculum development, updating, and instruction implementation for all programs. Each program incorporates the district mission, the Graduate Profile, and the content area purpose statement. The curriculum specifies the standards on which it is based. For example, the math program incorporates the TEKS, the national math standards, and the district curriculum. The program also specifies the staff development provided, defines effective or best practices, and lists the different assessments it uses.

GPISD gives release time to curriculum teams during the year; the teams also work over the summer. The district's program directors, teachers, and instructional specialists work collaboratively to design and update the curriculum. The GPISD curriculum cycle includes the development of course objectives based on state mandates, district

expectations, and student needs. Correlation of course objectives to the TEKS and state assessments, development of the scope and sequence, development of sample units of study, and development of appropriate assessments including benchmark tests are also part of the process. GPISD's scope and sequence is consistent across grade and educational levels (elementary, middle, high) in each subject area.

GPISD has a long-range five-year curriculum management plan that contains an annual cross-subject-area calendar that shows textbook adoptions and curriculum document development or revision, benchmark test and district assessment revisions, and unit development or revision. The plan also includes five-year plans for each content area and educational level. The plans specify a schedule for development or revision of annual assessments, staff development to be provided, available resources, and curriculum revisions.

MISD should fully develop, monitor, review, and update the curriculum for all subject areas and grade levels based on a revised district curriculum management plan. The revised plan should delineate the curriculum development and updating process; define criteria for screening and reviewing suggestions for curriculum modifications; develop a methodology for translating suggestions into actual additions and modifications; specify the qualifications, such as content knowledge and experience, of teachers invited to help revise the curriculum; implement a training program for teachers participating in curriculum revision; delineate a quality assurance process for curriculum development and modifications; and set a timeline for curriculum updating by subject area and grade level.

MISD should streamline the process for providing suggestions for curriculum updating and modification. The streamlined process should include a form for recording concerns, questions, and suggestions for curriculum updating and modifications. The form should include instructions on level of detail and specificity and how to phrase suggested additions and modifications. The process should specify to whom the suggestions should be forwarded by subject area, and lay out the criteria for screening and reviewing the suggestions and include a description of how suggestions are incorporated into the curriculum. The form should be available online on the district website or e-mailed to all teachers and instructional administrators, thereby simplifying the feedback process.

MISD should set priorities in curriculum development. The top curriculum-related priority for the Curriculum and Instruction Department should be to conduct a needs

assessment on gaps in the current MCAPS. Once all gaps have been identified, MISD should focus on the full development of the MCAPS Summaries for all core subject areas and grade levels. All MCAPS Summary sections should have fully developed sections addressing "Specifications (adjustments to SE)," "Duration," "Academic Language," "Related Student Expectations," "Teaching Strategies (best practices and pitfalls), Activities, and Accommodations," and "Resources." Additionally, beginning in summer 2009, the district should fully develop all MCAPS Summary sections and ensure the updated MCAPS contain the Technology Applications TEKS; the newly revised English language arts and secondary math TEKS; the ESL/English Language Proficiency Standards; and AP/Pre-AP and GTAL extensions. Once the MCAPS Summaries have been fully developed and updated by district staff, MISD should ensure that these updates are reflected in their new curriculum and data management system. Beginning in 2009–10, MISD should start an annual cycle of modifying and updating the curriculum.

The fiscal impact of this recommendation is based on the assumption that there are 39 MCAPS guides for Kindergarten through grade 8. At the elementary level, grades K through 5, MISD has a total of 24 guides in English language arts, social studies, math, and science. At the middle school level—grades 6, 7, and 8—MISD has 15 guides in English language arts, math, and Pre-AP math for grades 6 and 7, Algebra I, social studies, and science.

The review team recommends using four six-teacher teams at the elementary level. The six teachers of a team will represent each grade level. At the middle school level, there will be four three-teacher teams, with each teacher representing a grade level, plus a two-member Algebra I team. The core subject teams will be supported by instructional technology, ESL, and AP and GTAL specialists. Each team will be responsible for a core subject area: English language arts, math, social studies, and science. The seven teams will be responsible for the full development of all MCAPS guides and the integration of the Technology Applications TEKS; the newly revised English language arts and secondary math TEKS; the ESL/English Language Proficiency Standards; and AP/Pre-AP and GTAL extensions. The instructional specialists will assist and monitor the teams.

Fully developing the guides and integrating the Technology Applications TEKS; the newly revised English language arts and secondary math TEKS; the ESL/English Language Proficiency Standards; and AP/Pre-AP and GTAL extensions

will require 38 teachers (24 elementary and 14 middle school) plus four specialists, each for a four-day period. Based on a daily rate of $150, the total cost in summer 2009 to fully develop the 39 guides and integrate the Technology Applications TEKS; the newly revised English language arts and secondary math TEKS; the ESL/English Language Proficiency Standards; and AP/Pre-AP and GTAL extensions into them is estimated at $25,200 (38 teachers + 4 specialists x $150 stipend per day x 4 days = $25,200).

MISD should start an annual process of updating guides in summer 2010. The district should use 2-member teams for 1 day to update each guide. The total cost for updating 39 guides annually is estimated at $11,700 (2 teachers per guide x 39 guides x $150 stipend per day x 1 day = $11,700).

The total five-year cost to the district for curricular efforts will be $72,000.

ASSESSMENTS (REC. 10)

MISD's locally developed curriculum-related assessments are not well-aligned to the curriculum.

The Manor Curriculum Alignment Plan: A Strategy for Continuous School Improvement specifies two major strategies for monitoring the pacing and effectiveness of the curriculum. These strategies consist of the six-week formative assessments and the mid-year benchmark tests. The Curriculum and Instruction Team develops or facilitates the six-week formative assessments. The district uses these assessments to evaluate the curriculum, including instruction and pacing, and views them as a critical first step in ensuring alignment of the written, taught, and assessed curriculum. The mid-year benchmark tests are typically previously released TAKS tests. Their administration is considered a practice run for the actual TAKS administration.

There is a difference of opinion among MISD teachers about the validity and helpfulness of the six-week assessments. Both principals and elementary and middle school teachers indicated that they do not have much faith in the six-week assessments because of the poor alignment between the curriculum and the assessments. The assessments, according to teachers interviewed, do not follow the TAKS format or the SEs and as a result are not helpful to them or their students. Recognizing the limited usefulness of the assessments, some principals develop their own assessments.

A review of e-mails that teachers sent to the Curriculum and Instruction Department regarding the six-week assessments

points to a great deal of confusion and frustration. For example:

- The assessments did not align with the taught curriculum because some teachers used the wrong six-week curriculum document due to a coding error.

- An analysis that an instructional specialist conducted of the six-week assessment questions and the SEs on which the assessment was supposed to be based confirmed that the two were not "perfectly aligned." Furthermore, the test bank from which the instructional specialist drew questions did not contain "good questions" for some of the SEs and concepts covered in the curriculum. Instead of writing new questions, the instructional specialist indicated that there was not time to do a proper job because "I have so many tests to write that I cannot possibly do a good job of this." Instead, the instructional specialist used questions that addressed concepts the students learned in an earlier six-week period, expecting that students would be able to apply their knowledge to a different context.

- A group of teachers was concerned that the MCAPS six-week curriculum and the textbook they were using as a major resource did not match and that the pace the MCAPS set was too fast. The teachers revised the MCAPS to match the textbook. MISD asked its teachers to use the textbook as one, but not the main, resource and considered what these teachers did to be inconsistent with expectations.

- Teachers expressed concern that a six-week assessment included questions about SEs that had not been taught during the six-week period over which the test was given, but would be taught in subsequent six-week periods.

Some elementary and middle school teachers pointed to the poor planning of the MCAPS six-week curriculum as a potential source for the poor alignment of the six-week assessments. For example, elementary school teachers noted that the math and science sequences set in MCAPS are not developmentally appropriate for the early grades and that second grade science has no specifications of what should be taught. Middle school teachers indicated that the TEKS are not well aligned to the MCAPS sequence and the timeline is not appropriate; they have thus changed the MCAPS curriculum several times themselves. Only 36 percent of the teachers and 33 percent of the principals and assistant principals who responded to the March 2009 survey think that the curriculum guides are appropriately aligned and coordinated (**Exhibit 2-7**).

The challenge and difficulty that teachers face, according to the instructional specialists, do not lie in the assessments themselves but in how teachers understand and translate the SEs into instruction. Interpretation and translation into lesson plans and actual instruction can vary greatly across teachers and schools; it can also vary between teachers and instructional specialists who develop the assessments. The difficulty in interpreting and implementing the curriculum effectively is also associated with the extent to which the curriculum has been developed and resources have been identified. Not having information in the MCAPS on instructional strategies, activities, and accommodations increases the likelihood of differences in interpretation. Only 24 percent of the teachers and 21 percent of the principals and assistant principals surveyed in March 2009 agreed that the curriculum clearly outlines what to teach and how to teach it (**Exhibit 2-7**).

One of the objectives of the curriculum and the six-week and mid-year assessments is to prepare students for the TAKS. As shown in **Exhibit 2-8**, MISD student performance on the

EXHIBIT 2-7
MISD SURVEY: CURRICULUM GUIDES

The curriculum guides are appropriately aligned and coordinated.					
RESPONDENTS	**STRONGLY AGREE**	**AGREE**	**NO OPINION**	**DISAGREE**	**STRONGLY DISAGREE**
Teachers	4%	32%	16%	30%	18%
Principals and Assistant Principals	4%	29%	38%	21%	8%

The district's curriculum guides clearly outline what to teach and how to teach it.					
RESPONDENTS	**STRONGLY AGREE**	**AGREE**	**NO OPINION**	**DISAGREE**	**STRONGLY DISAGREE**
Teachers	2%	22%	21%	38%	17%
Principals and Assistant Principals	4%	17%	38%	29%	12%

SOURCE: MJLM Survey, March 2009.

EXHIBIT 2-8
MISD AND STATE PASSING RATES ON TAKS
READING, WRITING, MATHEMATICS, SCIENCE, SOCIAL STUDIES, AND ALL TESTS
2005–06 THROUGH 2007–08

	READING		WRITING		MATHEMATICS		SCIENCE		SOCIAL STUDIES		ALL TESTS	
YEAR	MISD	STATE	MISD	STATE	MISD	STATE	MISD	STATE	MISD	STATE	MISD	STATE
2005–06	75%	87%	80%	91%	60%	75%	55%	70%	71%	87%	51%	67%
2006–07	76%	88%	84%	92%	61%	77%	50%	66%	73%	87%	48%	67%
2007–08	80%	91%	81%	93%	63%	80%	57%	74%	82%	91%	52%	72%

SOURCE: Texas Education Agency, AEIS, 2005–06 through 2007–08.

TAKS from 2005–06 to 2007–08 has remained below state passing rates in all subject areas, although students have made small gains in some areas. From 2005–06, when MISD implemented MCAPS, to 2007–08, student TAKS passing rates increased 1 percentage point in writing and on all tests; 2 percentage points in science; 3 percentage points in math; 5 percentage points in reading; and 11 percentage points in social studies. In spite of these gains, MISD students in 2007–08 were 9 percentage points below the state passing rate in social studies; 11 percentage points below the state passing rate in reading; 12 percentage points below the state passing rate in writing; 17 percent points below the state passing rate in math and science; and 20 percentage points below the state passing rate on all tests.

In 2007–08, MISD students were below the state passing rate in all grade levels and subject areas **(Exhibit 2-9)**.

Peer districts are school districts similar to Manor ISD that are used for comparison purposes. In 2007–08, MISD had the lowest TAKS passing rates in all subject areas among its

EXHIBIT 2-9
PERCENTAGE OF MISD AND STATE STUDENTS TESTED
MEETING TAKS STANDARD BY TEST AND GRADE
2007–08

		PERCENTAGE OF MISD AND STATE STUDENTS TESTED MEETING TAKS STANDARD						
GRADE	DISTRICT/ STATE	READING	MATH	WRITING	ENGLISH LANGUAGE ARTS	SCIENCE	SOCIAL STUDIES	ALL TESTS
Grade 3*	MISD	81%	69%					62%
	State	89%	85%					80%
Grade 4	MISD	72%	73%	83%				58%
	State	85%	87%	93%				77%
Grade 5*	MISD	70%	73%			64%		51%
	State	85%	86%			82%		72%
Grade 6	MISD	85%	66%					63%
	State	94%	83%					81%
Grade 7	MISD	68%	52%	78%				46%
	State	88%	80%	93%				74%
Grade 8*	MISD	87%	59%			45%	82%	37%
	State	95%	79%			69%	91%	64%
Grade 9	MISD	74%	44%					41%
	State	87%	64%					43%
Grade 10	MISD		45%		79%	46%	75%	33%
	State		66%		89%	65%	89%	55%
Grade 11	MISD		69%		83%	70%	92%	57%
	State		80%		91%	81%	95%	72%

*First administration only – English.
NOTE: Blank cells indicate that the TAKS is not administered at these grade levels/subject areas.
SOURCE: Texas Education Agency, AEIS, 2007–08.

EXHIBIT 2-10
MISD, PEER DISTRICTS, REGION 13, AND THE STATE
READING, MATHEMATICS, WRITING, SCIENCE, SOCIAL STUDIES, AND ALL TESTS
2007–08 TAKS PASS RATES

DISTRICT	READING	MATH	WRITING	SCIENCE	SOCIAL STUDIES	ALL TESTS
Mount Pleasant	91%	82%	91%	73%	90%	72%
Willis	90%	79%	95%	73%	91%	70%
Sheldon	87%	75%	91%	63%	88%	64%
Manor	**80%**	**63%**	**81%**	**57%**	**82%**	**52%**
Region 13	**91%**	**82%**	**92%**	**77%**	**92%**	**75%**
State	**91%**	**80%**	**93%**	**74%**	**91%**	**72%**

Source: Texas Education Agency, AEIS, 2007–08.

peers, as shown in **Exhibit 2-10**. MISD performance was also below that of Region 13 across all subject areas. MISD lagged behind the region by 11 percentage points in reading; 10 percentage points in social studies; 11 percentage points in writing; 19 percentage points in math; 20 percentage points in science; and 23 percentage points in all tests.

MISD's student performance is also reflected in its state and federal campus accountability ratings. For 2007–08, Decker Elementary and Manor High School were rated *Academically Unacceptable*. Decker Elementary has been *Academically Unacceptable* since 2005–06. Additionally, Decker Elementary, Manor High School, and Manor Middle School *Missed AYP* in 2007–08.

Lack of alignment between the MCAPS curriculum and the six-week assessments limits the usefulness of the assessments: it does not provide MISD teachers and instructional staff with an accurate picture of student performance, nor does it pinpoint areas of weakness. Interim assessments can be useful tools when appropriately constructed. For example:

- Clear Creek ISD (CCISD) developed, in collaboration with 10 other districts, a mathematics assessment test item bank. CCISD uses the assessment to measure whether the district's mathematics curriculum aligns with the TEKS and whether CCISD students can master the content.

- San Antonio ISD ensures that the interim assessments developed by its district content area departments match the standards, scope, and sequence of its curriculum and the TEKS.

- Fort Bend ISD (FBISD) ensures that its assessments are aligned to its curriculum guides. The FBISD curriculum guides identify basic instructional resources and describe approaches to delivering

content in the classroom. The process that FBISD uses in developing and supporting its curriculum guides includes multiple steps, including the development of district assessments and field testing them to ensure they are aligned with the curriculum.

Although these districts are larger than Manor ISD, these strategies exemplify successful approaches taken by school districts to ensure that the assessments they use are valid and aligned with their curriculum.

MISD should improve the alignment of the six-week assessments with the curriculum taught during the respective six-week period. The district should appoint an Assessment Review Committee composed of administrators and teachers representing different content areas and grade levels to ensure campus staff input and review are incorporated into the assessment development process. The district should field test its assessment items to ensure alignment with the curriculum and identify problem areas and gaps; out of this process MISD will be able to develop test item banks for each content area. The director of Curriculum and Instruction has created a professional development plan for department and campus personnel which is centered on the design and delivery of curriculum, instruction, and assessment with phases spanning from 2009–10 through 2010–11. The director should ensure that during the course of this training, department and campus personnel begin to develop tools to check the alignment between the taught curriculum and the assessments in MISD. This recommendation can be implemented with existing resources.

GIFTED AND TALENTED (REC. 11)

Gifted and Talented (G/T) instruction through in-class differentiation strategies is not consistently or effectively implemented in MISD. Students identified as Gifted Talented Advanced Learners (GTAL) are served by classroom instructors who are GT qualified. Differentiated instruction includes strategies which promote critical thinking and reasoning abilities, problem solving skills, independent studies, and creative product development.

MISD has made considerable efforts and progress in 2007–08 and 2008–09 to expand its Gifted Talented Advanced Learners (GTAL) program; it is small but growing. The program has been below region and state averages since 2003–04, as seen in **Exhibit 2-11**. Compared to its peers, the district had the lowest percentage of G/T students from 2003–04 to 2006–07. In 2007–08, it had the second lowest percentage of G/T students. However, MISD more than doubled the percentage of students in the GTAL program from 1.8 percent in 2005–06 and 2006–07 to 4.2 percent in 2007–08.

In 2008–09, MISD increased the number of its G/T students to 5.5 percent of total enrollment, with percentages of campus population ranging from 2.9 percent to 12.4 percent.

MISD doubled the number of its certified G/T teachers in the last three years from 61 in 2006–07 to 77 in 2007–08 and to 127 in 2008–09. MISD is also investing more aggressively in the program compared to its peers, the region, and the state. In 2007–08, MISD had the highest G/T per student expenditures among its peers; the district's per student expenditures were also above the regional and state rates **(Exhibit 2-12)**.

MISD's GTAL program includes students from grades K–12. MISD is expanding the GTAL program through multiple activities. The district has increased student identification since 2007–08 through increased program awareness efforts among teachers and parents. MISD provided G/T professional development to teachers, established teacher book clubs dealing with giftedness, and formalized the G/T identification and assessment measures, process, and procedures. Teachers have taken a greater role in nominating students. MISD also provided information to parents in English and Spanish through the district's GTAL website and the GTAL campus coordinators. The district has also increased the number of G/T certified instructors on each campus, and all principals have attended G/T training.

Teachers, parents, relatives, community members, and peers can nominate students to the program throughout the year. Students can also nominate themselves. The district holds GTAL awareness sessions during the year. Each MISD campus has a GTAL coordinator who supports the nomination and identification of students and the provision of GTAL services, and informs and supports parents of GTAL students. The nomination and assessment process includes several indicators: teacher and parent questionnaires; a cognitive abilities assessment (CogAT); record of academic performance; Texas English Language Proficiency Assessment System (TELPAS), Texas Proficiency Reading Inventory (TPRI), and English Language Learner and bilingual assessments; student's TAKS/ACT/PSAT/SAT scores; and the student's portfolio. The district conducts formal assessments of nominated students in grades 1–12 in the fall and spring. The campus GTAL committees review all information provided on each nominated student and inform parents in writing as to the results. The year-round nomination

EXHIBIT 2-11
MISD, PEER DISTRICTS, REGION 13, AND THE STATE
GIFTED AND TALENTED STUDENT PARTICIPATION
2003–04 THROUGH 2007–08

DISTRICT	2003–04	2004–05	2005–06	2006–07	2007–08	PERCENTAGE POINT CHANGE 2003–04 TO 2007–08*
Mount Pleasant	6.0%	6.3%	6.2%	5.7%	5.2%	-0.8
Sheldon	6.1%	6.3%	6.5%	5.6%	4.5%	-1.6
Willis	4.8%	4.4%	4.1%	3.8%	3.5%	-1.3
Manor	**3.6%**	**3.0%**	**1.8%**	**1.8%**	**4.2%**	**+0.6**
Region 13	**7.7%**	**7.4%**	**7.4%**	**7.4%**	**7.6%**	**-0.1**
State	**7.8%**	**7.7%**	**7.6%**	**7.5%**	**7.5%**	**-0.3**

*Percentage point change is defined as 2007–08 values minus 2003–04 values.
SOURCE: Texas Education Agency, AEIS, 2003–04 through 2007–08.

EXHIBIT 2-12
MISD, PEER DISTRICTS, REGION 13, AND THE STATE
INSTRUCTIONAL EXPENDITURES FOR GIFTED AND TALENTED
PROGRAMS
2007–08

DISTRICT	AMOUNT PER STUDENT	PERCENT*
Manor	**$1,305**	**1.1%**
Willis	$1,213	0.9%
Mount Pleasant	$1,062	0.8%
Sheldon	$400	0.3%
Region 13	**$977**	**1.3%**
State	**$1,136**	**1.5%**

*G/T expenditures as percent of total operating expenditures.
SOURCE: Texas Education Agency, AEIS, 2007–08.

and evaluation process has resulted in an increase of the number of students nominated. As of March 2009, the GTAL program had 346 students, or 5.5 percent of the district's 6,327 students, up from 247 or 4.2 percent in 2007–08.

The MISD GTAL program offers instructional services through differentiation in the classroom by G/T qualified teachers in the core subject areas. The purpose of the instructional strategies targeted at G/T students is to promote higher thinking skills, problem solving, independent study, and creative product development. However, differentiation is not implemented by all teachers with G/T students. According to the Advanced Programs coordinator, only about 60 percent of the teachers with G/T students implement differentiation. Principals observe classes with G/T students, but do not do so formally; they do not have an observation form to observe and monitor specific G/T objectives.

In addition to in-class instruction, GTAL students at five of MISD's elementary schools participate in a one-hour per week pullout enrichment program. The enrichment program focuses on project-based learning through MINDSPILL. At the sixth elementary campus, efforts for a pullout program were initiated at the start of 2008–09, but did not remain intact, as the focus of the campus was on building foundations for at-risk students. G/T instruction for students on this campus occurred solely through differentiation of instruction in the classroom. GTAL students also participate in University Interscholastic League (UIL) activities, fine arts enrichment sessions, field trips, book clubs, and a chess club. At the secondary level, GTAL is administered through Pre-AP and AP classes, dual credit college courses, and project-based learning activities. The secondary schools have

advocates who follow the progress of the GTAL-identified students. Decker Middle School is piloting project-based learning in Pre-AP classes in the four core subject areas. Manor High School has a pullout program every two weeks, where GTAL students work with a University of Texas film instructor on film-making and production.

A barrier to consistent implementation of differentiation strategies is the lack of a G/T curriculum. MISD's MCAPS curriculum does not include G/T enrichment or acceleration strategies. Although the GTAL program planned to incorporate such strategies into MCAPS in summer 2008, this was not implemented. The plan was postponed to summer 2009, when MISD expects to adopt a new curriculum framework. Support for the GTAL program on the part of principals also varies, as not all principals consider GTAL a priority. As a result of lack of a G/T curriculum, lack of consistent implementation of differentiation strategies in the classroom, and lack of consistent administrative support at all campuses, the presence and quality of G/T instruction varies districtwide.

Kerrville ISD (KISD) has recognized that teaching G/T students requires special skills and attributes. KISD formalized these skills and attributes into a G/T teacher profile and developed guidelines for G/T professional development. KISD also has specific criteria for the selection of G/T teachers. A principal must recommend a teacher for the G/T program. Teachers who participate in the KISD G/T program must have completed at least two years of successful teaching experience or have specialized experience in G/T education, expressed interest in teaching G/T students, demonstrated their interest by attending local workshops, completed self-instructional training modules or undertaken self-selected professional growth. The teachers also must have expressed willingness to undertake a minimum of 30 hours of special G/T training and be familiar with the curriculum in the grade levels of G/T students they will teach.

KISD has set specific guidelines for staff development of G/T teachers. In addition to the minimum 30 hours of training for new program staff, KISD G/T guidelines require a minimum of six training hours annually for program staff. The district also requires administrators with G/T program responsibility to have six hours of training and encourages them to attend update trainings. In addition, G/T teachers and administrators receive time off to attend professional conferences and workshops.

MISD should facilitate and ensure the use of consistent and effective differentiated instruction for all G/T students. This can occur by integrating G/T strategies into the MCAPS curriculum, by expanding and enhancing the district's professional development program for administrators and teachers in differentiation strategies, and by increasing the number of teachers and administrators trained. MISD should require teachers to integrate differentiation strategies into their lesson plans and check for differentiation as part of lesson plan review. MISD should develop a G/T classroom observation form, train principals and campus G/T coordinators in use of the form, and monitor classes with G/T students to determine whether, to what extent, and how effectively teachers use differentiation strategies with G/T students. The fiscal impact assumes that the increased G/T training for teachers and administrators will be included as a component of the district's existing professional development budget.

PROGRAM EVALUATION (REC. 12)

MISD does not have a comprehensive program evaluation system. The district uses TAKS results, benchmark data, six-week assessment results, and Performance Based Monitoring and Analysis System (PBMAS) data in different programs to examine student performance and accountability. Some programs such as Career and Technology Education and GTAL also use teacher, student, and parent surveys to assess satisfaction with the program. When surveyed, 53 percent of MISD teachers disagreed or strongly disagreed that MISD has a program evaluation system that goes beyond the analysis of test data **(Exhibit 2-13)**.

In 2007–08, MISD began a program evaluation initiative and brought in an external consultant to provide training to district administrators in program evaluation. **Exhibit 2-14** depicts the program evaluation framework that was developed as part of this initiative. The evaluation framework consists of a program mission statement and the articulation of long-term (navigational) goals developed by district administrators to reflect the district's culture. Based on these goals, each department or program developed one-year goals and

specified measurable indicators to assess if the department or program achieved its goals. Each program/department also assigned weights to each goal and defined four levels of performance/achievement, with "Level 4" representing the highest goal implementation or achievement. As this evaluation framework does not have criteria or a methodology for defining each level, program administrators made individual judgments about what constitutes a reasonable measure of growth. With no criteria or methodology for defining levels, it is not possible to determine whether the levels program directors set were appropriate, too lax, or too aggressive. This framework, which focuses exclusively on goal setting and achievement, is very limited as a program evaluation framework because it does not include any methodology or tools to evaluate process, quality of implementation and service delivery, and impact.

Although this framework was established for annual program evaluations and each program and department developed their evaluation framework, the system was never implemented. In fall 2008, MISD, at the request of the Board of Trustees, changed the focus of the framework from program evaluation to an evaluation of the extent to which programs meet district goals articulated in the District Improvement Plan. MISD asked department and program directors/administrators to align their department/program goals to the district goals. Specifically, program and department directors were asked to translate each district goal into a department/program goal, specify measurable indicators, assign weights, determine levels, and define action steps **(Exhibit 2-15)**. This shift in focus turned the program evaluation framework into a framework to evaluate the achievement of district goals. Using this framework, the district will be able to determine how well specific departments/programs contribute to the achievement of district goals. However, this framework does not allow for the collection of any information on the administration, service delivery, quality, and impact of the respective departments/programs.

EXHIBIT 2-13
MISD SURVEY: PROGRAM EVALUATION

The district has a program evaluation process and procedures looking at all the components of a program, not just at student test (TAKS, 6-week assessments) scores.

RESPONDENTS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
Teachers	3%	23%	21%	34%	19%

Source: MJLM Survey, March 2009.

EXHIBIT 2-14
MISD PROGRAM EVALUATION FRAMEWORK
2007–08

PROGRAM MISSION STATEMENT						
NAVIGATIONAL GOALS (5–10 YEAR GOALS)						
PROGRAM GOALS						
DASHBOARD INDICATORS						
Indicator	**Weight**	**Data Source**	**Level 1**	**Level 2**	**Level 3**	**Level 4**
Program Funding Sources						

SOURCE: MISD Central Office Program Evaluations, 2007–08.

The primary reason for conducting program evaluations is to collect data that will help with making informed decisions about various programs. Knowing the extent to which a program is meeting its goals helps determine whether or not to continue the program, modify it, or terminate it. Evaluation is necessary for determining if a program meets the needs of all students as well as those of specific student populations. Evaluations help identify program weaknesses and pinpoint needed changes, guiding continuous program improvements. Without evaluation, districts can neither determine and address the reason for poor performance, nor develop strategies for increasing program effectiveness. Evaluation also demonstrates how well the program supports student achievement on district and state tests, which is critical in light of the current emphasis on accountability and improvement in student performance.

Kerrville ISD's Program Evaluation Model consists of three phases and seven steps. The phases consist of organization and design; information collection; analysis; and conclusion. The model lays out in a step-by-step fashion all activities evaluators have to perform and has associated forms and examples. All activities that have to be performed are detailed and associated forms and examples are provided. The district identifies three programs per year for in-depth evaluation.

Galena Park ISD (GPISD) adopted the National Curriculum Audit Center model that evaluates programs based on standards of control, direction, consistency/equity, assessment, and productivity. The evaluation starts with a needs assessment implemented by an external team and is followed by stakeholder surveys. The evaluation report is organized by standard and includes commendations and recommendations for each standard, student and staff

EXHIBIT 2-15
MISD PROGRAM EVALUATION FRAMEWORK
2008–09

PROGRAM MISSION STATEMENT						
DISTRICT GOALS						
DEPARTMENT/PROGRAM FOCUS						
DASHBOARD INDICATORS						
Indicator	**Weight**	**Data Source**	**Level 1**	**Level 2**	**Level 3**	**Level 4**
Action Steps						

SOURCE: MISD Central Office Program Evaluations, December 2008.

demographic data, and stakeholder survey results. GPISD implements a systematic ongoing evaluation process and calendar that are integrated with the district's program development cycle. GPISD evaluates one districtwide department or core area and one support service area annually. The district uses the evaluation data to plan and revise all its educational programs over a five-year period.

MISD should develop and implement a program evaluation system ensuring that all district programs are evaluated for effectiveness on a regular basis. The system should go beyond the analysis of test scores and surveys and look at how programs are structured and managed, the instructional approaches they use, the quality of their staff, how they deliver services, how they integrate technology, and how well the students perform. The evaluation approach should have a well-defined methodology, measurable evaluation criteria, and specified lists of data sources and data elements. It should obtain primary data from all program stakeholders, use a mixed quantitative and qualitative data collection approach, and include an outline of an evaluation report format that presents the evaluation results, draws conclusions, develops recommendations and associated action plans, and identifies the staff responsible for implementing the plans.

Given the comprehensive nature of this evaluation system, the district should develop a calendar ensuring that all instructional and instructional support programs are evaluated on a regular basis to determine their effectiveness. Districts conducting comprehensive program evaluations tend to evaluate each program once in three years but ensure that all programs are evaluated within a five-year cycle. MISD

should develop a three to five-year calendar showing which programs will be evaluated each year. The evaluation system should include a follow-up report documenting whether the recommendations have been implemented and how implementation has affected student achievement. The district should provide copies of the evaluation and follow-up reports to the board of trustees. The MISD director of Curriculum and Instruction should be responsible for developing and implementing the program evaluation system. This recommendation can be implemented with existing resources.

INSTRUCTIONAL TECHNOLOGY INTEGRATION (REC. 13)

Technology is not integrated into the MISD curriculum or into classroom instruction districtwide. The district's MCAPS curriculum does not integrate technology as a resource or as part of teaching strategies and activities, and it does not link the Technology Applications TEKS to student expectations.

MISD typically has two computers in its classrooms: a teacher computer and a student computer. This set-up limits in-class use of computers and makes computer labs the primary means for student technology use. However, access to technology via computer labs is limited at the elementary school level. As shown in **Exhibit 2-16**, three of the six elementary schools have only one computer lab, and it is dedicated to Technology Applications and thus not accessible for other instructional purposes. Three of the elementary schools have two labs, of which one has a lab that is open to all teachers. The remaining two elementary campuses have two labs which are used for specific intervention software. Manor Middle School has one open computer lab, and

EXHIBIT 2-16
MISD INSTRUCTIONAL TECHNOLOGY BY SCHOOL
2008–09

MISD SCHOOLS	CLASSROOM COMPUTERS	OTHER TECHNOLOGY EQUIPMENT	COMPUTER LABS
Blake Manor Elementary	A minimum of 2 Internet capable computers per classroom	eInstruction CPS Units—3*	1 computer lab assigned to Specials rotation for State adopted software
			1 open computer lab
Bluebonnet Trail Elementary	A minimum of 2 Internet capable computers per classroom	eInstruction CPS Units—2 10 video projectors	1 computer lab assigned to Specials rotation for State adopted software
Decker Elementary	A minimum of 2 Internet capable computers per classroom	eInstruction CPS Units—1 10 video projectors Class set of iPods	1 computer lab assigned to Specials rotation for State adopted software 1 open computer lab assigned to integration projects and focused TAKS strategies
Manor Elementary	A minimum of 2 Internet capable computers per classroom	eInstruction CPS Units—1	1 computer lab assigned to Specials rotation for State adopted software

EXHIBIT 2-16 (CONTINUED)
MISD INSTRUCTIONAL TECHNOLOGY BY SCHOOL
2008–09

MISD SCHOOLS	CLASSROOM COMPUTERS	OTHER TECHNOLOGY EQUIPMENT	COMPUTER LABS
Oak Meadows Elementary	A minimum of 2 Internet capable computers per classroom	eInstruction CPS Units—1	1 computer lab assigned to Specials rotation for State adopted software
			1 open computer lab assigned to integration projects and focused TAKS strategies
Presidential Meadows Elementary	A minimum of 2 Internet capable computers per classroom	eInstruction CPS Units—2	1 computer lab assigned to Specials rotation for State adopted software
Decker Middle School	A minimum of 2 Internet capable computers per classroom		2 CTE computer labs
			2 open computer labs
			1 open computer lab assigned to integration projects and focused TAKS strategies
			20 computers in library
Manor Middle School	A minimum of 2 Internet capable computers per classroom	eInstruction CPS Units—2	3 computer labs assigned for CTE classes
			1 open computer lab
Manor High School	Average of 1.8 Internet capable computers per classroom	eInstruction CPS Units—3	1 open computer lab
			1 computer lab in library
			3 mobile carts with 30 laptops
Manor New Tech High School	1:1 computer-student ratio	interactive white boards	5 mobile carts with 30 laptops
			75 Apple iMac
			75 Dell desktops
Excel High School	A minimum of 2 Internet capable computers per classroom		3 computer labs assigned for A+ software

*eInstruction CPS refers to an interactive Classroom Performance System where students use clickers to answer questions.
SOURCE: MISD Long-Range Technology Plan 2008–2011 and MISD Information Technology Services Department, March 2009.

Decker Middle School has three open computer labs, one of which is used for specific intervention software. Access is greater at the high school level mainly through the use of mobile computer carts.

Technology use is not consistent across schools. According to administrators and teachers, the lack of consistency is due to several factors including inequities in the volume and new technology available, with more recently opened schools having more technology and more up-to-date technology. The review team's survey confirms this situation. In the survey, 59 percent of the teachers and 41 percent of the principals and assistant principals who responded disagreed or strongly disagreed that there is equal access to technology across campuses (**Exhibit 2-17**).

According to MISD instructional specialists, few elementary school teachers use technology in the classroom. Technology integration at the secondary level varies by subject area; it is more integrated in science or in advanced classes.

MISD technology staff report that not all principals support technology integration or consider it a high priority;

EXHIBIT 2-17
MISD SURVEY: ACCESS TO COMPUTERS

All schools have equal access to educational materials such as computers, television monitors, science labs, and art classes.

RESPONDENTS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
Principals and assistant principals	13%	38%	8%	29%	12%
Teachers	5%	27%	9%	32%	27%

SOURCE: MJLM Survey, March 2009.

principals give greater priority to preparing students for TAKS than to teaching or integrating technology. Also, the district does not make optimal use of the technology it already has available. For example, the distance-learning lab at Manor High School has not been used effectively in 2008–09. The lab can be used not only by Manor High School students but is accessible, because of its physical proximity, to Manor Elementary School and Manor Middle School students and teachers. The computer training lab has also not been used this year for teacher training on the integration of technology into instruction. Although the 2008–09 MISD DIP addresses technology, the integration of technology in instruction is not one of the district goals and is only addressed through three broad strategies **(Exhibit 2-18)**.

The integration of technology into instruction is addressed in a limited way in the 2008–09 MISD campus improvement plans (CIPs), as seen in **Exhibit 2-19**. Three of the six elementary schools do not include any technology-related strategies in their respective CIPs. The three elementary schools that include technology strategies focus on the use of specific software and equipment or the computer lab. The integration of technology in instruction is addressed in only one of the two middle school CIPs. None of the CIPs identify the need for technology training and technology integration training for teachers, staff, and administrators.

MISD offers keyboarding classes as electives at the two middle schools and MHS. Technology Applications classes are offered at the two high schools and at Decker Middle School. While the middle schools do not require students to take any technology classes, Technology Applications electives are offered at both campuses.

The Texas School Technology and Readiness (STaR) chart is an online self-assessment tool that shows district or campus efforts to effectively integrate technology into instruction. The STaR chart serves as a standard for assessing technology preparedness in Texas schools, as it measures technology integration in four key areas: Teaching and Learning; Educator Preparation and Development; Leadership, Administration and Instructional Support; and Infrastructure for Technology. The STaR chart consists of four levels of progress: Early Technology, Developing Technology, Advanced Technology, and Target Technology.

As displayed in **Exhibit 2-20**, MISD schools, with the exception of Manor Elementary and Manor New Tech High School, are primarily in the Developing Technology phase in the Teaching and Learning area on the School Technology and Readiness (STaR) chart. Bluebonnet Trail Elementary, with limited access to a computer lab, was in the Early Technology phase in the Teaching and Learning key area as recently as 2007–08.

EXHIBIT 2-18
MISD DISTRICT IMPROVEMENT PLAN
TECHNOLOGY INTEGRATION GOALS AND STRATEGIES
2008–09

GOAL	STRATEGY
Goal 1: Increase student performance and achievement, closing the achievement gap among all student groups (African American, Hispanic, English Language Learners, Special Education, and Economically Disadvantaged).	Strategy 11. Utilize technology to enhance instruction and increase achievement for all students.
Goal 2: Recruit, develop, and retain highly effective teachers, administrators and support staff.	Strategy 2. Increase staff fluency in technology applications and disseminate best practices for technology integration to enhance 21st Century Learning Environments.
Goal 7: Provide strategic alignment and sound stewardship of resources, including funding, personnel, technology, and facilities.	Strategy 7. Develop, implement, and support policies and procedures that will standardize current and emerging technologies, promote equity, and provide access to all District stakeholders.

SOURCE: MISD District Improvement Plan, 2008–09.

EXHIBIT 2-19
MISD CAMPUS IMPROVEMENT PLANS
TECHNOLOGY-RELATED GOALS AND STRATEGIES
2008–09

GOAL	STRATEGY
Blake Manor Elementary	
Goal 1: Increase student performance and achievement, closing the achievement gap among all student groups (African American, Hispanic, English Language Learners, Special Education, and Economically Disadvantaged).	Use technology integration lab to reinforce, enrich and extend classroom instruction
Bluebonnet Trail Elementary	
Technology integration strategies are not mentioned under any of the goals.	
Decker Elementary	
Technology integration strategies are not mentioned under any of the goals.	
Manor Elementary	
Goal 7: Provide strategic alignment and sound stewardship of resources, including funding, personnel, technology, and facilities.	3. TAKS preparation materials Resources: technology
Oak Meadows Elementary	
Goal 7: Provide strategic alignment and sound stewardship of resources, including funding, personnel, technology, and facilities.	1. Utilize Success Maker lab to provide academic intervention for increased student performance in the areas of reading and math. 2. Incorporate the use of document cameras and computer/projection technology in every classroom to enhance the delivery of instruction. 3. Use campus computerized video technology to film student-led productions that can be broadcast campus-wide.
Presidential Meadows Elementary	
Technology integration strategies are not mentioned under any of the goals.	
Decker Middle School	
Goal 1: Increase student performance and achievement, closing the achievement gap among all student groups (African American, Hispanic, English Language Learners, Special Education, and Economically Disadvantaged). Goal 7: Provide strategic alignment and sound stewardship of resources, including funding, personnel, technology, and facilities.	Integrate the use of technology to enhance content area (use of Internet, mounted projectors, computer labs, and document camera); use of discovery streaming for video. Use all 5 computer labs everyday to enhance student learning in math, science and reading. Use the mounted projectors and document cameras to enhance daily lessons. Use the navigator math system in the math enrichment classrooms to provide additional support to learning basic math skills in enrichment/remedial math classes. Use the science tech labs in all science classes to increase student learning, especially in 8th grade science. Use the Success-Maker software program in the enrichment classes…to provide support in learning math and reading for 6th, 7th, and 8th grade students.

EXHIBIT 2-19 (CONTINUED)
MISD CAMPUS IMPROVEMENT PLANS
TECHNOLOGY-RELATED GOALS AND STRATEGIES
2008–09

Manor Middle School	
Technology integration strategies are not mentioned under any of the goals.	
Manor High School	
Goal 1: Increase student performance and achievement, closing the achievement gap among all student groups (African American, Hispanic, English Language Learners, Special Education, and Economically Disadvantaged).	1. Increase evidence of engaging materials in the classroom – Increase use of technology. 10. Increase the use of technology in math and science classroom during instructional environments by use of computer on wheels (Cow), document cameras, Distance Learning Lab, United Streaming, etc.
Manor New Tech High School	
Goal 1: Increase student performance and achievement, closing the achievement gap among all student groups (African American, Hispanic, English Language Learners, Special Education, and Economically Disadvantaged).	4. Use technology integration lab to reinforce, enrich, and extend classroom instruction.
Goal 7: Provide strategic alignment and sound stewardship of resources, including funding, personnel, technology, and facilities.	4. Provide students one-to-one computer access at school.
Excel High School	
Goal 1: Increase student performance and achievement, closing the achievement gap among all student groups (African American, Hispanic, English Language Learners, Special Education, and Economically Disadvantaged).	1. Modification of A+ computer-based curriculum to meet students [needs] (e.g. reading level, content mastery level).
Goal 7: Provide strategic alignment and sound stewardship of resources, including funding, personnel, technology, and facilities.	1. Update the computer based A+ software. 2. Increase number of updated, networked computers for the classroom.

SOURCE: MISD Campus Improvement Plans, 2008–09.

EXHIBIT 2-20
MISD SUMMARY STaR CHART BY CAMPUS
2008–09

CAMPUS	TEACHING AND LEARNING
Blake Manor Elementary	Developing Tech
Bluebonnet Trail Elementary	Developing Tech
Decker Elementary	Developing Tech
Decker Middle	Developing Tech
Excel High	Developing Tech
Manor Elementary	Advanced Tech
Manor High	Developing Tech
Manor Middle	Developing Tech
Manor New Tech High	Target Tech
Oak Meadows Elementary	Developing Tech
Presidential Meadows Elementary	Developing Tech

SOURCE: MISD Campus Summary STaR Chart Report, 2008–09.

Districts increase the use and integration of technology by setting teacher technology competencies, adopting technology usage standards, assessing staff technology competencies and providing staff development targeted to needs, and creating mechanisms to support technology integration such as the establishment of a Technology User Group, setting up teacher technologist programs, and using innovative technologies. For example:

- San Elizario ISD developed a matrix that defines four levels of understanding for teacher technology use, surveyed teachers to determine their level of technology proficiency, developed individual plans for teachers specifying their training needs, and created a staff development program tailored to these needs. The technology proficiency assessment includes a component to assess teachers' use of technology for teaching and learning. It measures teachers' use of technology for teaching and learning by examining the impact of technology on each teacher's role and on collaborative learning; patterns of teacher use;

frequency and design of instructional settings using computers; curriculum integration; use of technology applications; patterns of students' use of technology; and teachers' technology skills and competencies.

- Elgin ISD implemented a Teacher Technologist program to encourage technology integration into the curriculum. On each campus, a teacher serves as a teacher technologist for a semester. These teachers receive extensive training on the use and integration of technology. These teachers work with other teachers in their school to integrate technology into the classroom.

- Smithville ISD established technology proficiency and technology integration standards for teachers. The district provided comprehensive technology-related training to teachers. Teachers used the standards to integrate technology into their lesson plans and used the computer labs to do projects with their students. District staff and principals monitored the integration of technology into the curriculum.

- Lufkin ISD encouraged technology integration into instruction by supporting teachers who are early adopters to use and integrate new technology. These teachers, in turn, served as role models for other teachers. The Technology Department encourages use of technology by providing written manuals for each technology such as digital cameras, web portals, and merging documents.

- Some districts also form Technology User Groups. Typically, the user groups consist of teachers and administrators who are knowledgeable about technology and who successfully integrated technology into instruction. These teachers meet periodically to provide input into district technology standards, technology use, and technology integration issues.

Districts also focus on student activities as related to technology integration. For example:
- Clint ISD has made extensive use of videoconferencing technology. In 2004–05, elementary school students participated in a videoconference with a London-based author and attended a virtual trip to the Cincinnati zoo. Middle school students had a videoconference with students in South Dakota, and both groups of students compared the mountains in their respective states. Middle schools students also took a cyber field trip to the Museum of Television

and Radio to learn about important events in the history of African Americans. High school students used videoconferencing for a virtual tour of the Cleveland Museum of Art and took a virtual tour of Pearl Harbor for a World War II events unit.

- San Angelo ISD elementary school students use technology in innovative ways. Students use video and computer equipment to produce a daily 15-minute news broadcast; 5th grade students participate in Lego Robotics projects, 4th grade students use technology for their stock market club; and students use multi-media and Alpha Smart Boards to connect to Internet broadcasts of events such as space shuttle launches.

MISD should expand access to technology and integrate technology into the curriculum and instruction districtwide. MISD should recognize technology use and integration as a district priority and articulate such in its Long-Range Technology Plan and the District and Campus Improvement Plans. The district should create mechanisms to support technology integration such as the establishment of a Technology User Group and a teacher technologist program, and encourage its teachers and students to use innovative technologies in daily classroom activities. MISD should incorporate the Technology Applications TEKS and technology resources into MCAPS and increase access to technology, especially in schools without an open lab or with only one non-designated open lab by configuring the schedules of all its labs to maximize use and purchasing additional mobile labs. MISD should develop teacher technology competencies and adopt technology usage standards. It should conduct a technology skills/competencies assessment of administrators, teachers, and staff and provide staff development targeted to these needs.

MISD can increase access to technology in three ways: (1) examine use of the dedicated labs and if not fully used, allow open access during certain periods or days; (2) schedule access to the open labs in an efficient manner, providing each class at least one lab session every week or two weeks; and (3) purchase a mobile lab with 25 laptops for use in the classroom. Expanding access by purchasing a mobile computer lab is essential for Blake Manor Elementary, Bluebonnet Trail Elementary, Manor Elementary, and Presidential Meadows Elementary, as these schools do not have any open computer labs. MISD has established a mobile lab standard of 25 laptops per mobile cart. The cost for each mobile lab, including costs for the cart, laptops, an electrical power source, charging stations, and wireless access points is

estimated at $30,000. Using this estimate, the one time cost of mobile labs for the four elementary schools without open labs is $120,000 ($30,000 per lab x 4 schools).

ALTERNATIVE EDUCATION PROGRAMS (REC. 14)

MISD's alternative education programs do not provide effective instructional and support services to meet student needs. The district's alternative education programs are affected by lack of leadership, low attendance, inequitable allocation of teachers, lack of access to qualified substitute aides, and lack of student data. MISD's alternative education programs are located on their own separate campus. The campus houses Excel High School, the alternative academic program, and the Manor Alternative Program (MAP), the district's disciplinary alternative education program, in separate wings of the campus.

Excel High School is a competency-based high school "designed for students who experienced limited success in a traditional high school." The program is for students 16 to 21 years old with a minimum of six credits who are a year or more behind academically. Students who are admitted to Excel High School have to be motivated and want to complete high school. The Excel program provides all the required courses for a diploma, including TAKS preparation and college readiness. Excel High School requires that students complete at least 3.5 academic credits each semester. Students must apply, pass an entrance exam, and attend an orientation prior to admittance to the school. Excel can serve up to 40 students. The Excel curriculum consists of individualized computer-assisted instruction through software, as well as offline supplements.

MAP provides education in an alternative setting for students from elementary through high school who are placed there as a result of disciplinary infractions. MAP has a capacity of 71 students including eight elementary students, 25 middle school students, 18 grade 9 students, and 20 grades 11 and 12 students. In March 2009, MAP enrolled 69 students. MAP offers a full-day program from 7:30 to 3:00 for elementary students and from 8:30 to 3:30 for secondary students. The student's home campus provides lesson plans, and instruction is individualized. When a student is assigned to MAP, the student and parent participate in an intake conference to review expectations, attendance, dress code, and MAP procedures. According to the MAP—Parent & Student Resource Packet 2008–09, students are assigned to MAP for a minimum stay of 10 days or longer until "they earned the appropriate number of 'successful' days." Middle

school students typically stay for 30 "successful" days and high school students for 45 "successful" days with a review after 30 days. However, the 30-day review implemented by the home campus does not always take place, leaving students frustrated and angry. Students get daily cards showing the number of points they have earned or lost for infractions. Students have to wear a uniform. No data is available on MAP students regarding the number sent to MAP, student characteristics, or length of stay for 2007–08 or 2008–09.

Excel High School offers two sessions: a morning session from 8:00 to 12:15 and an afternoon session from 12:15 to 4:15. Students are required to attend one four-hour session, five days a week. One of the requirements for Excel students is that they attend class regularly. However, attendance at Excel High School is low, especially in the morning session. The school's attendance policy states…"Students with continual attendance and/or tardy problems who miss three (3) days or parts of days of school will be sent a letter about their attendance problem. Another absence (unexcused) may result in a student being taken to court or may be dismissed from the Excel program." Excel is required to file "Failure to Attend School" on students with three unexcused absences in four weeks or ten unexcused absences in six months. Excel's administration has not followed its attendance policy. It is also unclear who among Excel administrators has the responsibility to file "Failure to Attend School" with the parents and the court. Furthermore, Excel lacks a standardized form for recording attendance and does not have procedures for monitoring attendance. Attendance is not recorded daily for all students and absences are not monitored in a timely fashion. Also, attendance data is not verified. For example, several Excel students who were withdrawn during the last week of the 4th six-week period for excessive absences were reported present every day for the previous five weeks. Staff interviewed regarding this problem attribute the low attendance to lack of enforcement on the part of the campus administrator who allowed students to come and go as they pleased.

As shown in **Exhibit 2-21**, during January and February 2009, students in the morning sessions were absent on average 7.8 out of 36 days. Daily attendance ranged from 19 to 77.8 percent with an average attendance rate of 54.3 percent. Attendance in the afternoon session was higher, although average daily attendance was only 78.7 percent with students absent 5.1 days, on average.

Lack of attendance affects students' academic performance and ability to complete the program and graduate. Excel

EXHIBIT 2-21
EXCEL HIGH SCHOOL ATTENDANCE
1/7/2009–2/27/2009

	MORNING SESSION	AFTERNOON SESSION
Number of students	21	16
Number of school days	36	36
Total number of absences	200	81
Number of unexcused absences	163	46
Percentage of unexcused absences	81.5%	56.8%
Average number of days students were absent	7.8	5.1
Absenteeism rate*	26.5%	14.1%
Daily attendance rate ranges	19.0% - 77.8%	42.9% - 93.8%
Average daily attendance	54.3%	78.7%

*Absenteeism rate = total number of absences / (number of students x number of days in reporting period).
SOURCE: Excel High School Attendance, January–February 2009.

High School has a high dropout rate. Over the past three years, Excel's dropout rate exceeded 30 percent. In 2006–07, 35 percent of the students dropped out; in 2007–08, 37.5 percent dropped out; and in 2008–09, 32.5 percent had dropped out by the time of the review in March 2009.

Excel and MAP share administrators and staff, including a principal and counselor. At the time of the review in March 2009, the principal had been placed on administrative leave and an interim principal had been hired to fill the position. However, the programs still lack leadership. Excel and MAP share a counselor who also serves as the assistant principal. Additional staff includes eight teachers and four aides (one aide for Excel and three aides for MAP). The eight teachers include a special education teacher, a CTE teacher, and an ESL teacher. The teachers are certified in the core subject areas and in electives. All but two of the teachers rotate between the two programs and are supposed to allocate equal time to Excel and MAP. According to the counselor/assistant principal, the equal allocation of time is not occurring. The teachers spend the majority of their time (estimated at 75 percent) with the MAP students, thereby under-serving the Excel students. This time inequality stems from the wide range of grade levels these teachers have to serve at MAP. Rotating between the two programs is difficult for the teachers. Teaching MAP students is also more challenging because of lack of textbooks for all students. MAP does not have its own set of textbooks. MAP students are supposed to bring their textbooks from their home campuses, but not all students do, and classes are often short of textbooks which makes it more difficult for teachers to implement their lesson plans.

MAP has difficulty recruiting qualified substitutes to serve as aides because the substitutes consider MAP a challenging environment and want higher pay than the district offers. MISD offers $70 a day to all substitutes. Consequently, the program either is left without a substitute or has substitutes that are not qualified. This factor also limits the program's ability to have two staff members present in each of the four classrooms. The requirement of two staff in each MAP classroom is for security, to separate students with minor offenses from students with more serious offenses, and to work with the students.

The lack of leadership, low attendance of Excel students, inequitable allocation of teachers between the two programs, lack of access to qualified substitute aides, and lack of student data have a negative effect on the ability of MISD's alternative education programs to serve students effectively.

A third alternative education program in MISD is the Manor Accelerated Academic Recovery Center (MAARC) program, which was established in January 2009 at Manor High School for students who are four to 15 credits behind. Manor High School has 125 students who meet this criterion; 38 percent of these students are pregnant or parents. The district is considering expanding options for students who are at-risk of dropping out by adding a second credit recovery alternative program at Manor High School for students who are one to three credits behind and expanding Excel High School. MISD wants to add four programs to Excel High School in 2009–10. The Gateway program for overage middle school students who have been retained two or more grade levels; the Accelerated High School program for students who wish to graduate early in a non-traditional setting; the Career Pathway program for students who are at least one year behind graduation and have a deficit of seven or more credits; and a GED program for students with two or more years of deficit in credits. In order to expand Excel High School and add four new programs in 2009–10, the district must address the current problems at the Excel/MAP campus.

In December 2008, TEA published the *Dropout Recovery Resource Guide* which offers a wealth of information on the organization, services, and management of alternative education programs. The *Guide* offers detailed information on planning alternative education programs, program

staffing, intake, program options and schedule, academic and CTE services, social services, post-secondary advancement supports, dealing with special populations, funding sources, and program evaluation. For each alternative education program component, the *Guide* presents information on the state of practice in Texas, worthwhile practices and strategies in other states and nationally, a step-by-step process for implementing and managing the respective component, and examples from 30 Texas school districts of varying sizes.

MISD should evaluate the effectiveness of educational services provided by the district's alternative education programs. MISD should review best practices in alternative education and restructure its alternative programs as it plans to expand the Excel program. In determining future leadership of the campus, the district should consider candidates who are proven leaders that can establish a positive culture and create a welcoming and caring environment while also enforcing attendance and discipline. The district should also ensure that both alternative programs have the staffing resources they need, including teachers who are effective in dealing with the student population in the programs, counseling staff, and aides, and re-configure the allocation of staff to each program because sharing staff between the two program has not been equitable, resulting in under-serving the Excel students. In order to recruit qualified substitutes to serve as aides at the campus, the district should require a specific set of qualifications for these substitutes, and consider an alternate pay scale for these positions as well.

MISD should use technology for administrative purposes, develop a student data system for both alternative programs, and generate weekly reports on both programs. The student data system for both alternative programs should record daily student attendance and disciplinary incidents. It should have a comprehensive demographic profile on each student, identify student service needs, track the length of time a student stays in the program and ensure that MAP students' length of stay is reviewed after 30 days, and follow-up with students after they complete the Excel program, or for MAP students, after they return to their home campus. The campus principal should share the weekly reports on Excel and MAP students with the respective staff and determine need for follow-up actions. The data system can also be an important component of program evaluation for Excel and MAP. This recommendation can be implemented with existing resources.

STUDENT IMMUNIZATIONS (REC. 15)

MISD does not enforce immunization compliance at Manor High School. MISD maintains an electronic health records system which records students' health conditions and tracks their immunization status. The system generates an All Health Conditions Report for each student showing whether the student has all required immunizations. MISD distributes Immunization Request letters to parents of students who are due for immunizations, specifying the type of immunization their child needs and the date by which the immunization is required in order to comply with state law. The district also informs parents about the availability of the immunization free of charge during a specified week at the child's school as part of the Vaccines for Children Program.

The electronic health records system also generates an Annual Report of Immunization Status by campus and grade level. Until 2008–09, MISD was not in compliance regarding student immunizations. The standard the Texas Department of State Health Services Immunization Branch uses requires that 95 percent of students be current on their immunizations for a campus to be considered in compliance. As of March 13, 2009, Manor High School had 86 student delinquencies, or 8.4 percent of its students were non-compliant. However, these delinquent students were still attending school. **Exhibit 2-22** shows the number of Manor High School students delinquent on their immunizations in 2008–09. Immunization delinquency is highest in grade 9 and lowest in grade 12. MISD had a low compliance record for 2005–06 and 2006–07. In 2007–08, 150 students at Manor High School were delinquent in their immunizations throughout the year. In March 2008, 75 high school students were non-compliant. At the end of 2007–08, 50 students remained delinquent.

EXHIBIT 2-22
MANOR HIGH SCHOOL IMMUNIZATION DELINQUENCIES BY GRADE LEVEL
2008–09

GRADE LEVEL	ENROLLMENT	NUMBER OF DELINQUENCIES	PERCENT OF DELINQUENCIES
Grade 9	256	31	12.1%
Grade 10	344	27	7.8%
Grade 11	186	18	9.7%
Grade 12	241	10	4.1%
Total	**1,027**	**86**	**8.4%**

Source: Manor High School Annual Report of Immunization Status, March 2009.

Both the Texas Administrative Code §97.66 and MISD policy require that students not in compliance with their immunizations be excluded from attending school. Similarly, MISD's policy on immunizations states that "If at the end of the 30-day period, a student has not received a subsequent dose of the vaccine, the student is not in compliance and the District will exclude the student from school attendance until the required dose is administered." However, according to the Health Services coordinator, this practice has not been consistently enforced; students delinquent in their immunizations are not consistently kept out of school.

MISD should enforce immunization compliance districtwide. MISD's superintendent should issue a public statement on the importance of immunizations and stress the consequences of not being in compliance. The superintendent's statement should be published on the district and school web pages, and the district should distribute copies to all parents at the beginning of the year. The district's immunization compliance enforcement policy should also be included in the student and parent handbooks that currently do not state the consequences of being non-compliant. The superintendent and the nurses should work with the principals to ensure that students get their immunizations and that non-compliance will result in not allowing students to attend class. Addressing this issue in a timely manner is critical, as the Texas Department of State Health Services has announced changes in school immunization requirements for five vaccines, effective August 1, 2009. This recommendation can be implemented with existing resources.

LIBRARY STAFFING AND SERVICES (REC. 16)

MISD's library staffing practices are not consistent with the Texas State Library and Archives Commission (TSLAC) standards, and librarians spend little time instructing students. In 2008–09, the district had five certified librarians, four librarians that were not certified, and one library aide staffing its nine campus libraries. The *School Library Programs: Standards and Guidelines for Texas* requires that librarians be certified; however, non-certified librarians staff four of the district's elementary school libraries.

The TSLAC is directed to develop voluntary school library standards under Texas Education Code (TEC) §33.021. According to this section of the Texas Education Code, "A school district shall consider the standards in developing, implementing, or expanding library services." According to the TSLAC, "School Library Programs: Standards and Guidelines for Texas originates in the ongoing effort to support effective schools, results-oriented education, and accountability. These aims are at the forefront of the school librarianship."

Standards are a professional tool for objective assessment based on recognized measures of performance. The revised *Standards and Guidelines for Texas* is based on research that shows a correlation between school library resources and services and greater student achievement.

The TSLAC criteria classify libraries into four categories: *Exemplary, Recognized, Acceptable, and Below Standard*. The TSLAC public school library staffing standards are based on schools' average daily attendance (ADA). **Exhibit 2-23** provides TSLAC standards for professional and non-professional staff.

EXHIBIT 2-23
TSLAC LIBRARY STAFFING STANDARDS
2009

STAFF	STANDARDS			
	EXEMPLARY	RECOGNIZED	ACCEPTABLE	BELOW STANDARD
Professional Staff	At least:	At least:	At least:	
0–500 ADA	1.5 Certified Librarians	1.0 Certified Librarian	1.0 Certified Librarian	Less than 1.0 Certified Librarian
500–1,000 ADA	2.0 Certified Librarians	1.5 Certified Librarians	1.0 Certified Librarian	Less than 1.0 Certified Librarians
1,001–2,000 ADA	3.0 Certified Librarians	2.0 Certified Librarians	1.0 Certified Librarian	Less than 1.0 Certified Librarians
2,001 + ADA	3.0 Certified Librarians + 1.0 Certified Librarian for each 700 students	2.0 Certified Librarians + 1.0 Certified Librarian for each 1,000 students	2.0 Certified Librarians	Less than 2.0 Certified Librarians

EXHIBIT 2-23 (CONTINUED)
TSLAC LIBRARY STAFFING STANDARDS
2009

STAFF	STANDARDS			
	EXEMPLARY	RECOGNIZED	ACCEPTABLE	BELOW STANDARD
Paraprofessional Staff	At least:	At least:	At least:	
0–500 ADA	1.5 Paraprofessionals	1.0 Paraprofessionals	0.5 Paraprofessionals	Less than 0.5 Paraprofessionals
500–1,000 ADA	2.0 Paraprofessionals	1.5 Paraprofessionals	1.0 Paraprofessionals	Less than 1.0 Paraprofessionals
1,001–2,000 ADA	3.0 Paraprofessionals	2.0 Paraprofessionals	1.5 Paraprofessionals	Less than 1.5 Paraprofessionals
2,001 + ADA	3.0 Paraprofessionals + 1.0 Paraprofessional for each 700 students	2.0 Paraprofessionals + 1.0 Paraprofessional for each 1,000 students	2.0 Paraprofessionals	Less than 2.0 Paraprofessionals

SOURCE: Texas State Library and Archives Commission (TSLAC), School Library Programs: Standards and Guidelines for Texas, 2009.

Exhibit 2-24 shows 2008–09 MISD student enrollment for each campus and the number of professional and paraprofessional library staff, and compares these statistics to the TSLAC *Acceptable* standards. Only two of the six elementary schools have certified librarians. Overall, MISD is below the *Acceptable* standard by four certified librarian positions and 7.5 paraprofessional positions according to TSLAC on all campuses except for Bluebonnet Trail Elementary. Only one of the elementary schools has a paraprofessional aide instead of having 5.5 paraprofessional aides across the six campuses, based on the standards. Additionally, the two middle schools are below the *Acceptable* standard by two aides. Only one of the three high schools (MHS) has a library, but all three campuses have access to its

EXHIBIT 2-24
MISD ENROLLMENT, NUMBER OF LIBRARIANS AND LIBRARY AIDES
TSLAC ACCEPTABLE STANDARD BY CAMPUS
2008–09

CAMPUS	ENROLLMENT	ADA**	LIBRARIANS	TSLAC ACCEPTABLE STANDARD	OVER/ (UNDER)	PARAPRO-FESSIONAL LIBRARY AIDES	TSLAC ACCEPTABLE STANDARD	OVER/ (UNDER)
Blake Manor Elementary	598	568	1 Certified Librarian	At least 1 Certified Librarian	-	0	At least 1.0 aide	(1.0 aide)
Bluebonnet Trail Elementary	820	779	1 Certified Librarian	At least 1 Certified Librarian	-	1 Aide	At least 1.0 aide	-
Decker Elementary	558	530	1 Librarian*	At least 1 Certified Librarian	Librarian not yet certified	0	At least 1.0 aide	(1.0 aide)
Manor Elementary	688	654	1 Librarian*	At least 1 Certified Librarian	Librarian not yet certified	0	At least 1.0 aide	(1.0 aide)
Oak Meadows Elementary	457	434	1 Librarian*	At least 1 Certified Librarian	Librarian not yet certified	0	At least 0.5 aide	(0.5 aides)
Presidential Meadows Elementary	589	560	1 Librarian*	At least 1 Certified Librarian	Librarian not yet certified	0	At least 1.0 aide	(1.0 aide)
Decker Middle School	607	577	1 Certified Librarian	At least 1 Certified Librarian	-	0	At least 1.0 aide	(1.0 aide)

EXHIBIT 2-24 (CONTINUED)
MISD ENROLLMENT, NUMBER OF LIBRARIANS AND LIBRARY AIDES
TSLAC ACCEPTABLE STANDARD BY CAMPUS
2008–09

CAMPUS	ENROLLMENT	ADA**	LIBRARIANS	TSLAC ACCEPTABLE STANDARD	OVER/ (UNDER)	PARAPRO-FESSIONAL LIBRARY AIDES	TSLAC ACCEPTABLE STANDARD	OVER/ (UNDER)
Manor Middle School	715	679	1 Certified Librarian	At least 1 Certified Librarian	-	0	At least 1.0 aide	(1.0 aide)
Manor High School	1,027	976	1 Certified Librarian	At least 1 Certified Librarian	-	0	At least 1.0 aides	(1.0 aide)
Manor New Tech High School	225	214	No library					
Excel High School and JJSEP	43	N/A	No library					
Total	**6,327**	**5,971**	**5 Certified, 4 in process of being certified**	**At least 9 certified librarians**	**4 not yet certified**	**1**	**8.5**	**(7.5)**

*Librarian is in process of being certified.
**ADA was calculated by multiplying school enrollment by 95 percent.
Source: MISD Enrollment for School Year 2008–09, March 2009 Enrollment. Texas State Library and Archives Commission (TSLAC), School Library Programs: Standards and Guidelines for Texas, 2009.

services. According to the TSLAC standards, MHS is below the *Acceptable* standard by one paraprofessional aide.

To compensate for the lack of paraprofessional aides, the middle school librarians use students who work in the library for several hours a day. Some of the elementary school librarians rely on parent volunteers. The lack of aides, however, requires that librarians spend a considerable portion of their time engaging in clerical tasks, thereby limiting the time they can spend on instructional and research tasks. Librarians estimated that they spend about 40 to 60 percent of their time on clerical duties. Librarians also have other non-library duties. The middle school librarians act as substitute teachers and the administration uses the library as a student drop off center. One of the elementary librarians is acting as a testing coordinator, spending 25 to 100 percent of her time during the spring semester involved in test coordination and monitoring. Her aide serves as a hall monitor, and one of the middle school librarians is a TAKS monitor.

The lack of library aides has a significant impact on the services that librarians can provide. The study *Texas School Libraries: Standards, Resources, Services, and Students' Performance* showed that lower than recommended staffing

levels and especially the absence of library aides significantly curtails the range and type of services that librarians can provide. The presence of library aides and the number of hours they work are critical to librarians' ability to perform the range of high priority activities. Library aides "free" the librarian from having to perform basic library activities and allow the librarian to allocate time to activities that are more directly related to teaching and training staff and students, such as collaboratively planning and teaching with teachers, providing staff development to teachers, facilitating information skills instruction, managing technology, communicating with school administrators, and providing reading incentive activities. In addition, the extent to which library aides are available increases library usage by individuals and classes.

MISD should ensure that all campus libraries maintain consistency with the TSLAC *Acceptable* staffing levels, and review campus schedules to ensure librarians are providing student instruction. In order for all campuses to meet the TSLAC *Acceptable* standard, MISD should:
- Create 7.5 additional library paraprofessional positions to appropriately staff all nine campuses with libraries, excluding Bluebonnet Trail Elementary which already meets the *Acceptable* standard.

- Ensure that the four librarians that are not certified are on a timeline/plan to obtain their certification.

Additionally, the district should review campus staffing and schedules to ensure that all librarians are able to provide instruction to students. Clerical tasks should be delegated to paraprofessional aides, and testing coordination/monitoring, and substitute duties should be assigned to other campus personnel.

As MISD is paying all its librarians a librarian salary regardless of certification, the fiscal impact for this recommendation includes library paraprofessional aides only. The fiscal impact is based on the 2008–09 salary of a library aide, which is $18,263. When including 17 percent benefits or $3,105 ($18,263 x .17), the total per position is $21,368. The annual cost of creating 7.5 library aides is $160,260 beginning in 2009–10, with a five-year cost to the district of $801,300.

LIBRARY COLLECTION (REC. 17)

MISD's library collections are not consistent with the Texas State Library and Archives Commission (TSLAC) standards. Neither budgets nor materials are distributed equitably across district campuses.

The *School Library Programs Standards and Guidelines for Texas* defines an *Acceptable* library collection as a balanced collection of 9,000 books, audiovisual software, and multimedia, or at least 16 items per student at the elementary level, at least 14 items per student at the middle school level, and at least 12 items per student at the high school level, whichever is greater. A *Recognized* library collection is defined as a balanced collection of at least 10,800 books, audiovisual

software, and multimedia, or at least 18 items per student at the elementary level, at least 16 items per student at the middle school level, and at least 14 items per student at the high school level, whichever is greater. An *Exemplary* library collection is a balanced collection with at least 12,000 books, audiovisual software, and multimedia, or at least 20 items per student at the elementary level, at least 18 items per student at the middle school level, and at least 16 items per student at the high school level, whichever is greater.

Exhibit 2-25 shows MISD's collection size by campus. According to the TSLAC standards, three of the district's nine campuses with libraries do not meet the *Acceptable* standard for the number of library holdings. These campuses are Blake Manor Elementary, Oak Meadows Elementary, and Presidential Meadows Elementary. Of the six remaining campus libraries, three are *Acceptable* and three are *Exemplary* in comparison with TSLAC standards.

Exhibit 2-26 displays information about the three campuses that are *Below Standard* regarding collection size according to the TSLAC guidelines.

A review of the district's overall library collection indicates that the district has enough materials; they just are not distributed equitably among campuses.

Principle 3 in the TSLAC standards states that the purpose of funding is "to build and maintain a program with resources and services that supports a curriculum designed to develop information-literate students who achieve success in the classroom and function effectively in the community." To meet the *Acceptable* criterion, district libraries should receive from the campus or district budget an amount equal to the

EXHIBIT 2-25
MISD CAMPUS ENROLLMENT, LIBRARY COLLECTION SIZE, AND BOOKS PER STUDENT COMPARED TO TSLAC STANDARDS 2008–09

CAMPUS	AVERAGE DAILY ATTENDANCE	NUMBER OF BOOKS	NUMBER OF BOOKS PER STUDENT	TSLAC LIBRARY STATUS
Blake Manor Elementary	568	8,684	15.3	*Below Standard*
Bluebonnet Trail Elementary	779	15,581	20.0	*Exemplary*
Decker Elementary	530	13,827	26.1	*Exemplary*
Manor Elementary	654	13,864	21.2	*Exemplary*
Oak Meadows Elementary	434	6,833	15.7	*Below Standard*
Presidential Meadows Elementary	560	7,208	12.9	*Below Standard*
Decker Middle School	577	8,579	14.9	*Acceptable*
Manor Middle School	679	11,461	16.9	*Acceptable*
Manor High School	976	9,717	9.9	*Acceptable*

Source: MISD Library Report, 2008–09; MISD Enrollment, March 2009.

EXHIBIT 2-26
TSLAC COLLECTION SIZE STANDARD COMPARED TO MISD BELOW STANDARD CAMPUSES
2008–09

CAMPUS	NUMBER OF BOOKS FOR ACCEPTABLE STANDARD	NUMBER OF BOOKS IN SCHOOL COLLECTION	NUMBER OF BOOKS BELOW ACCEPTABLE STANDARD
Blake Manor Elementary	8,816	8,684	132
Oak Meadows Elementary	6,944	6,833	111
Presidential Meadows Elementary	8,624	7,208	1,416
Total	**17,440**	**15,892**	**1,659**

NOTE: Number of books needed for *Acceptable* standard was calculated at 16 books per elementary school student and was based on campus enrollment numbers.
SOURCE: MISD Library Report, 2008–09.

number of students times 1.00 multiplied by the average replacement cost of a book. The average daily attendance and library collection budget for each MISD campus in 2008–09 is found in **Exhibit 2-27**.

EXHIBIT 2-27
MISD CAMPUS ADA AND LIBRARY BUDGETS
2008–09

CAMPUS	AVERAGE DAILY ATTENDANCE	LIBRARY COLLECTION BUDGET
Blake Manor Elementary	568	$10,000
Bluebonnet Trail Elementary	779	$11,828
Decker Elementary	530	$4,000
Manor Elementary	654	$13,599
Oak Meadows Elementary	434	$2,700
Presidential Meadows Elementary	560	$8,000
Decker Middle School	577	$4,400
Manor Middle School	679	$8,200
Manor High School	976	$8,600

SOURCE: MISD Library Report, 2008–09.

As evidenced in **Exhibit 2-27**, the library collection budgets across MISD campuses are not equitable. There does not appear to be any consistency in determination of budgets; for example, a correlation of budget funds to the number of students as recommended by TSLAC.

MISD should evaluate library collection sizes and budgets, and develop strategies to ensure all libraries meet the TSLAC *Acceptable* standard. One strategy the district could investigate is the redistribution of library materials at the elementary level. While MISD is *Below Standard* by 1,659 library materials at the elementary level, three of its campuses are rated *Exemplary* because of their abundant library collections. In order for all campuses to meet the TSLAC *Acceptable* rating, the district could review the materials at the *Exemplary* campuses and redistribute materials, as appropriate, to the *Below Standard* libraries.

Should the district choose to investigate the cost for purchasing additional materials for the three *Below Standard* libraries, consideration should be given to the average cost of a child or young adult book, which is $21.36.

Regarding library budgets, the district should review the funding principles in the TSLAC guidelines to determine an appropriate and equitable funding method for all MISD libraries.

FISCAL IMPACT

RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
9. Fully develop, monitor, review, and update the curriculum for all subject areas and grade levels based on a revised district curriculum management plan.	($25,200)	($11,700)	($11,700)	($11,700)	($11,700)	($72,000)	$0
10. Improve the alignment of the six-week assessments with the curriculum taught during the respective six-week period.	$0	$0	$0	$0	$0	$0	$0
11. Facilitate and ensure the use of consistent and effective differentiated instruction for all G/T students.	$0	$0	$0	$0	$0	$0	$0
12. Develop and implement a program evaluation system ensuring that all district programs are evaluated for effectiveness on a regular basis.	$0	$0	$0	$0	$0	$0	$0
13. Expand access to technology and integrate technology into the curriculum and instruction districtwide.	$0	$0	$0	$0	$0	$0	($120,000)
14. Evaluate the effectiveness of educational services provided by the district's alternative education programs.	$0	$0	$0	$0	$0	$0	$0
15. Enforce immunization compliance districtwide.	$0	$0	$0	$0	$0	$0	$0
16. Ensure that all campus libraries maintain consistency with the TSLAC *Acceptable* staffing levels, and review campus schedules to ensure librarians are providing student instruction.	($160,260)	($160,260)	($160,260)	($160,260)	($160,260)	($801,300)	$0
17. Evaluate library collection sizes and budgets, and develop strategies to ensure all libraries meet the TSLAC *Acceptable* standard.	$0	$0	$0	$0	$0	$0	$0
Totals	**($185,460)**	**($171,960)**	**($171,960)**	**($171,960)**	**($171,960)**	**($873,300)**	**($120,000)**

CHAPTER 3

HUMAN RESOURCES MANAGEMENT

MANOR INDEPENDENT SCHOOL DISTRICT

CHAPTER 3. HUMAN RESOURCES MANAGEMENT

The largest operating expenses incurred by school districts are for personnel costs. On average, a school district's payroll cost is 75 to 85 percent of its annual operating budget. Manor Independent School District's (MISD) payroll costs have increased $10 million from 2004–05 to 2007–08. However, payroll costs as a percentage of operating costs have decreased from 83 percent to 79 percent during the same time period. MISD's annual operating budget has increased each year to reflect additional revenues received as a result of the growing student population along with the increase in capital outlay funds.

MISD employed 970 individuals for a total budgeted salary of $39 million in the 2008–09 school year without grants and benefits. In the 2007–08 school year, payroll costs represented 79 percent of MISD's general fund budget. The state payroll cost average for all funds has been between 61 and 64 percent over the last four years.

The Human Resources (HR) Department has eight budgeted positions, including the district receptionist and has a budget of $312,948 for 2008–09. Human Resources processes all district employees throughout the employee life-cycle; hiring, retention, promotions, transfer, and termination. Basic employee data is maintained and updated by both the Business Office and the Human Resources Department on the district's information management system – Skyward. MISD is in the process of transitioning HR responsibilities from the Business Office to better serve the needs of the district. MISD has purchased a software application to fully automate its application process. The system will be implemented in the 2009–10 school year and will interface with the current information system to improve the data integrity of the district's critical HR information. Currently, most Human Resources processes are still paper driven.

ACCOMPLISHMENTS

- MISD's Human Resources Department prepared and carried out a districtwide job fair, prior to other district job fairs in the region.

- MISD has formed a Human Resources Advisory Committee to provide input regarding district HR objectives.

FINDINGS

- MISD has low teacher retention and a high percentage of teachers with little or no professional experience.

- The district's performance evaluation instrument for non-exempt staff is not being used effectively to provide constructive feedback and measure professional growth.

- MISD's job descriptions are generally not reflective of responsibilities and tasks actually performed, have incomplete or inconsistent qualifications listed, and in some cases, reflect duplicative tasks.

- Human Resources personnel may not have all of the professional training necessary to efficiently perform their assigned tasks.

- Human Resources does not ensure that employee-related district procedures are consistently disseminated across all campuses and are up-to-date with current statutory requirements, district policies, and applicable forms.

- The district does not have a Human Resources Procedures Manual.

RECOMMENDATIONS

- **Recommendation 18: Further develop teacher recruitment efforts and pursue multiple strategies to improve the teacher retention rate.**

- **Recommendation 19: Revise non-exempt employee performance evaluation instruments to include department specific and objective performance measures.**

- **Recommendation 20: Update all job descriptions currently being used by the district.**

- **Recommendation 21: Evaluate training needs for Human Resource staff and require staff to receive training necessary to effectively meet the district's changing personnel needs.**

- **Recommendation 22: Complete development of a comprehensive district employee handbook containing up-to-date employee-related policies**

with current law, district policies, and applicable forms.

- **Recommendation 23: Develop a detailed procedures manual to include all processes and procedures conducted within Human Resources.**

DETAILED ACCOMPLISHMENTS

JOB FAIR

MISD's Human Resources Department prepared and carried out a districtwide job fair, prior to other district job fairs in the region. MISD's job fair was held on Saturday, March 28, 2009, from 9 am to 12 noon at the Manor Middle School Gymnasium and received sponsorship from several local business organizations. Advertising for the job fair was placed in the local paper, on the MISD website, on the state HR Association website, on banners throughout the community, and through information packets sent to over a dozen colleges/universities. Prior to their arrival at the job fair, candidates were asked to complete the online Gallup Teacher Insight Interview. The job fair's goal was to attract 200 – 250 potential candidates while the actual turnout was approximately 175. All candidates were provided an MISD informational pamphlet and were able to talk to district personnel stationed throughout the gymnasium.

HUMAN RESOURCES ADVISORY COMMITTEE

MISD has formed a Human Resources Advisory Committee (HRAC) to provide input regarding district HR objectives. HRAC will not develop policy but provide feedback on policies, practices, or initiatives in use or under consideration by the district. The committee meets 3–4 times per year and, to be respectful of the committee members' time, the scheduled meeting duration is approximately one hour, depending on the agenda. The primary focus for this year's HRAC involves topics regarding teacher employment hiring practices, review of the substitute teacher program, and review of the district's evaluation systems. The initial HRAC was held December 4, 2008 and the meeting outcomes, which were reported to district leadership January 14, 2009, were as follows:

- In general, HR and the new teacher induction office will become more active in the recruitment and selection of teachers.

- Decrease the number of alternative certification program (ACP) teacher hires.

- Conduct a Manor ISD Teacher Job Fair in March or April (See Job Fair Accomplishment).

- The HR Office will hire un-assigned teachers for high needs areas. Human Resources Department will need to develop a "Hired Unassigned" letter and protocol.

- Review the online application system so applicants can express interest for teaching positions prior to posting individual positions.

- Upgrade HR recruitment material to discuss C&I instructional program, new teacher induction program and highly unique benefits to working in Manor ISD.

- Review the idea of payment for retention bonuses.

DETAILED FINDINGS

TEACHER RETENTION (REC. 18)

MISD has low teacher retention and a high percentage of teachers with little or no professional experience. MISD has had a high teacher turnover rate since 2004–05, with its teacher turnover rates ranging between 20 percent in 2005–06 and 26.5 percent in 2006–07. In 2007–08, the district exceeded the state average in teacher turnover by 10 percent **(Exhibit 3-1)**. Teachers' average tenure with the district was lower than the state average, and average tenure declined from five years in 2003–04 to three years in 2007–08. From 2003–04 to 2007–08, the percentage of beginning teachers at MISD more than tripled from 8.4 percent in 2003–04 to 27 percent in 2007–08. District administrators attribute the high teacher turnover to the following factors: turnover in district and campus administrators; the high growth rate of the district that led to the opening of new schools with new principals; and the high cost of gas in 2007–08 that may have led teachers who lived outside the district to take positions closer to home.

MISD has fewer experienced teachers than its peer districts, the region, and the state **(Exhibit 3-2)**. Peer districts are districts similar to Manor ISD that are used for comparison purposes. Among its peers, MISD has the highest percentage of beginning teachers and the second highest percentage of teachers with one to five years of experience. In 2007–08, the district had 27 percent beginning teachers, compared to 8.2 percent for Region 13 and 7.9 percent for the state. MISD also had almost 10 percent more teachers with only one to five years teaching experience than did the region or the state.

EXHIBIT 3-1
MISD AND STATE TEACHER TURNOVER RATE AND YEARS OF EXPERIENCE
2003–04 THROUGH 2007–08

	2003–04	2004–05	2005–06	2006–07	2007–08
TURNOVER RATE					
MISD teachers	15.4%	25.6%	20.0%	26.5%	25.2%
Texas teachers	14.3%	16.1%	14.6%	15.6%	15.2%
AVERAGE YEARS OF EXPERIENCE WITH DISTRICT					
MISD teachers	5.0	4.4	4.2	3.7	3.0
Texas teachers	7.8	7.5	7.6	7.5	7.4
PERCENTAGE OF BEGINNING TEACHERS					
MISD teachers	8.4%	14.0%	17.3%	24.3%	27.0%
State	6.5%	7.7%	7.5%	8.1%	7.9%

SOURCE: Texas Education Agency, Academic Excellence Indicator System (AEIS), 2003–04 through 2007–08.

EXHIBIT 3-2
PERCENTAGE OF TEACHERS BY YEARS OF EXPERIENCE
MISD, PEER DISTRICTS, REGION 13, AND THE STATE
2007–08

DISTRICT	BEGINNING	1–5 YEARS	6–10 YEARS	11–20 YEARS	20+ YEARS
Manor	**27.0%**	**39.3%**	**11.7%**	**14.3%**	**7.6%**
Sheldon	12.2%	50.2%	17.2%	10.3%	10.1%
Mount Pleasant	8.9%	30.5%	17.4%	23.7%	19.6%
Willis	5.1%	33.3%	20.4%	24.9%	16.3%
Region 13	**8.2%**	**29.6%**	**20.4%**	**23.5%**	**18.3%**
State	**7.9%**	**29.8%**	**19.7%**	**23.4%**	**19.2%**

SOURCE: Texas Education Agency, AEIS, 2007–08.

One factor that affects teacher retention is salaries. **Exhibit 3-3** compares teacher salaries in MISD with local districts and the state for 2007–08. MISD is compared to five neighboring districts that include Austin ISD, Del Valle ISD, Elgin ISD, Pflugerville ISD, and Round Rock ISD. MISD has a competitive beginning teacher salary that is higher than the state average. However, for teachers with one to five years experience, MISD has the second lowest average teacher salaries. The district was in the middle among these neighboring districts with regard to salaries for teachers with six or more years of experience.

Teacher retention impacts a school's learning environment and student academic performance. Having a stable staff is particularly important when districts want to implement new policies and changes to meet higher performance standards. Teacher turnover is expensive. According to a 2002 symposium of the National Commission on Teaching and America's Future (NCTAF) on "Unraveling the 'Teacher Shortage' Problem – Teacher Retention is the Key," a Texas study showed that a 15.5 percent annual teacher turnover, with a 40 percent turnover of teachers in their first three years, resulted in a cost of $329 million a year. If the costs of termination, substitutes, learning curve loss, and new training are included, the cost estimate increased to $1.2 billion.

In order to recruit the best qualified teaching candidates, MISD hosted its first job fair for teachers in March 2009 (See earlier Job Fair Accomplishment). The district also attends other job fairs to recruit teachers. **Exhibit 3-4** shows the MISD recruiting schedule for spring 2009.

While MISD has become proactive in teacher recruitment efforts in 2008–09, the district does not track these efforts and is therefore unable to determine whether their recruiting efforts are financially beneficial to the district. The Human Resources Department does not maintain records of individuals employed by the district through recruiting activities. As a result, MISD has not produced information that weighs the cost of recruiting activities against the results and benefits of such efforts. The lack of information about

EXHIBIT 3-3
TEACHER SALARIES BY YEARS OF EXPERIENCE
MANOR ISD AND NEIGHBORING DISTRICTS
2007–08

| | MANOR ISD | NEIGHBORING DISTRICTS | | | | | STATE |
		AUSTIN	DEL VALLE	ELGIN	PFLUGER-VILLE	ROUND ROCK	
Beginning teachers	**$40,244**	$40,967	$40,514	$35,752	$40,138	$40,410	**$39,372**
1–5 years experience	**$40,392**	$40,425	$41,356	$37,872	$41,128	$42,043	**$41,374**
6–10 years experience	**$42,761**	$41,795	$43,886	$40,872	$43,184	$43,776	**$43,886**
11–20 years experience	**$47,473**	$45,782	$49,292	$46,204	$48,220	$48,447	**$48,174**
Over 20 yrs. experience	**$54,913**	$54,063	$53,972	$51,622	$55,038	$58,219	**$56,354**
Average salaries	**$42,751**	$44,563	$44,534	$42,657	$45,457	$46,405	**$46,179**

SOURCE: Texas Education Agency, AEIS, 2007–08.

EXHIBIT 3-4
MISD RECRUITING SCHEDULE
SPRING 2009

DATE	JOB FAIR
February 26	Texas A&M International University
March 5	Mary Hardin Baylor
March 12-13	Texas Alliance of Black School Educators Annual Conference
March 24	Texas Tech University
March 25	Sam Houston State University
March 26	St. Edward's University
March 30	Texas A&M University
April 1	Texas State University
April 2	UT Brownsville
April 3	UT Pan Am
April 8	Huston Tillotson
April 8	Prairie View A&M
April 8	UT San Antonio
April 9	UT Austin
April 9	Lamar University
April 19	UT El Paso
April 24	Stephen F. Austin
June 5	Region XIII

SOURCE: MISD Office of Human Resources, March 2009.

recruiting efforts could place the district at a competitive disadvantage for hiring new teachers, as the district may be spending their recruiting resources in locations that do not attract teachers who remain in Manor. The district has, however, implemented an online application system in March 2009 that uses queries and reports to gather various applicant information.

Exit surveys are mailed to departing staff when they leave the district, with the request that the surveys be completed and mailed back to the Human Resources Department. However, the district does not conduct analysis of the exit surveys or follow up with former employees who do not return them. Additionally, MISD does not conduct face-to-face exit interviews, so the district may be missing out on an opportunity to capitalize on discussions with departing staff that could assist the district in identifying areas of success and areas of possible improvement. **Exhibit 3-5** provides a summary of the exit survey results. Review team analysis of the surveys indicate that of the 65 exit surveys provided, 54 percent of the staff responding would recommend MISD to others as a place to work.

MISD relies heavily on alternative certification programs for its teacher candidate pool. An alternative certification program (ACP) is an intensive one-year educator preparation program designed to certify teacher-candidates through a series of workshops, seminars, activities, and an internship. ACPs evolved out of the need to address teacher shortages due to student population increases, teacher resignations and retirements, and the inability of higher education institutions to meet the demand for teachers. MISD recruited 62 teachers in 2008–09: 50 teachers or 80.6 percent came from alternative

EXHIBIT 3-5
EXIT SURVEY RESULTS
2007–08

REASON FOR DEPARTURE	NUMBER	PERCENTAGE OF DEPARTURES
Retired	4	6%
Moving from District	15	23%
Better Position	15	23%
Dissatisfied with Work	8	12%
Other (ie. going back to school, commute too expensive, family obligations)	23	35%
Rounding		1%
Total	**65**	**100%**
Would Recommend MISD	35	54%
Reservations about Recommending MISD	19	29%
Would Not Recommend MISD	7	11%
No Opinion	4	6%
Total	**65**	**100%**

SOURCE: MISD exit surveys 2007–08 and MJLM calculations.

certification programs. Many of the openings were in high need areas such as secondary math and science.

The quality of alternative certification programs varies greatly. MISD hired teachers from 12 ACPs without screening the certifying programs carefully. Also, none of the 62 teachers MISD hired for 2008–09 had any prior teaching experience. This aspect requires the district to allocate considerable resources to its professional development, mentoring, and monitoring in addition to handling a large number of teachers new to the district. Finally, the employment of teachers with little or no experience may not be effective in light of the academic challenges MISD faces to make aggressive improvements in students' academic performance and move two schools out of their *Academically Unacceptable* status.

Research has shown that teachers who are well prepared and who feel well prepared tend to stay. Teachers who go through four- and five-year teacher preparation programs stay in teaching at a higher rate than teachers hired through alternative certification programs.

Research also indicates that teacher induction and mentoring programs can be beneficial. In an article entitled *The Impact of Mentoring on Teacher Retention: What the Research Says*, the authors state that teacher induction programs can increase

the confidence and effectiveness of new teachers through support, socialization, adjustment, development, and assessment. The types of activities involved in an induction program include classes, workshops, teacher orientations, seminars, and mentoring. MISD staff stated that the district has a New Teacher Support and Mentoring Program that is housed in the Professional Development Department and administered by the professional development specialist.

Another consideration regarding teaching staff is that MISD's student enrollment is reflective of the diverse population of the United States. To provide the youth of the district the opportunity to learn from teachers who represent their diverse cultural backgrounds, it is important that the district staff reflect this diverse population. Currently, the student population in the district is predominately minority (about 87 percent), and the teachers are predominately White (about 66 percent).

According to *Recruitment and Hiring of Minority Teachers to Provide a Better Learning Environment for All Children,* recruitment and hiring of minority staff is vitally important for both minority and non-minority students. All students should learn to understand people with different ideas and cultural perspectives and should have the opportunity to interact with teachers who share similar backgrounds and traditions. Minority staff can serve as positive role models thus providing exposure to shared as well as different cultural backgrounds.

Districts can use a variety of strategies to recruit and retain qualified teachers. Some examples used in school districts and elsewhere include:

- Kingsville ISD (KISD) expands its applicant pool by posting job listings and applications on its website. KISD developed a website that is linked to the web page of its regional education service center. This approach makes it easier for teachers and other educational personnel accessing the regional education service center job application website to link to the district's website. The KISD website has the application forms, district contact information, and other relevant forms.

- Comal ISD developed strong recruiting relationships with the education departments of selected universities and colleges. District representatives visit these institutions at least once a year to participate in a job fair, conduct interviews, and recruit candidates.

The district sends thank-you notes to all candidates interviewed.

• Galena Park ISD (GPISD) hires many new and inexperienced teachers directly out of colleges and universities. The district has several new teacher assistance programs and strategies. GPISD has two district-level teacher mentors who organize workshops, visit and host new teachers, and recruit school-based mentors. The lead teacher mentors receive a stipend and a certificate. GPISD also hosts a new teacher academy. The academy provides information to new teachers about policies, procedures and school routines; discipline procedures, attendance, classroom management, school goals and objectives, lesson plans, curriculum requirements, instructional expectations, etc.

• Hays CISD (HCISD) believes in a strong induction and mentoring program for their new teachers. The district believes in spending time training individuals to be mentors to the new teachers of the district in an effort to build relationships that will last throughout an individual's career in the district. To ensure a healthy work environment, HCISD uses a district-developed tool similar to an Organizational Health Instrument. Once results are calculated, the district as a whole and campuses individually use the data to determine areas of improvement for the district.

• Lancaster ISD uses an approach that upon hiring it is immediately communicated to the teacher that the district and the community care about them and are glad that they are joining their team. During a two day New Teacher Academy, the district not only conducts training and completes paperwork, they also put a personal touch on some activities. A local church hosts a lunch for the new employees of the district, and during a bus tour of the district, the new employees learn about the town of Lancaster and meet businesses and community organizations. Upon arriving at the local Wal-Mart, the new teachers are serenaded by the staff and are given supplies to help them in their classroom. The visit to the Medical Center results in a gift of medical supplies. Cedar Valley College provides course schedules, and a local fitness center provides applications for membership. To complete the tour, the group stops by the local library where the new employees can get their library card. The Lancaster Outreach Center provides each

new teacher with a bag of groceries and assistance with professional clothing. This community/school district effort is coordinated with the Chamber of Commerce and community organizations and businesses.

• Cedar Hill ISD (CHISD) developed innovative recruitment strategies targeting minority teachers. District administrators participate in recruitment events at selected universities and colleges with a large number of graduating minority teachers. During interviews, CHISD community members host the candidates at their homes. The district, in collaboration with the Chamber of Commerce, provides an annual welcome luncheon to teacher candidates. These efforts make the candidates feel comfortable and welcome and increases the likelihood of their accepting the offers. The district also collaborates with its respective education service center for referrals.

• The state of Connecticut has made recruitment of minority teachers a high priority. Through a pre-collegiate program, the state has encouraged fifth through twelfth graders to participate in a Young Educators Society (YES) Club. The focus of the club is to provide an environment to foster the encouragement of minority school aged students to pursue the teaching profession as their career. As students approach their junior and senior year in high school, the club offers summer field experiences for the club members to attend summer programs that result in college credit towards the student's teaching degree.

MISD should further develop its teacher recruitment efforts and pursue multiple strategies to improve the teacher retention rate. To increase teacher retention, MISD must create and sustain a stable environment on campuses in order to eliminate high administrative and teacher turnover.

MISD administration should develop strong relationships with departments of education at selected colleges and universities known for the quality of its teacher preparation programs. The district should develop relationships with regional education service centers as teacher referral sources. The district could also develop a teacher recruitment website and provide attractive and informative flyers or brochures to be distributed at selected universities, colleges, and regional education service centers.

MISD also should be more selective in its recruitment from alternative certification programs, identify the most effective

programs, and limit recruitment to those programs. The Human Resources Department should evaluate its activities annually, discontinue those efforts shown to be ineffective and continue those ones proven productive, and add activities as needed. MISD has begun implementing some of these strategies in 2008–09.

Human Resources should track recruiting efforts by identifying the source of new teachers. An analysis of each recruiting trip should be conducted by tracking the number of employment applications received. When MISD hires teachers, Human Resources should maintain information about the place where they were recruited and how long they remain with the district. Analysis of recruiting success should be conducted each year to determine where recruiting efforts will occur.

In regard to seeking minority individuals for employment in the district to closely align the staff ethnicity to that of the students, MISD should participate in both local and regional efforts to recruit qualified minority staff. Establishing a strong future educator program in the district to encourage current students to pursue education degrees is another option. MISD is in close proximity to the University of Texas and Austin Community College. Each of these institutions may possess knowledge the district could use to help in these areas. Recruiting at colleges and universities in the state that have predominantly minority populations is another possibility that the district can continue to pursue.

MISD should expand its efforts to develop additional strategies for teacher retention by having the superintendent form a committee to assist the Human Resources Department in developing a retention plan for the district. This plan must acknowledge the specific needs of the district as well as the worth of each and every teacher. By creating an ongoing atmosphere that is inviting and involving the community and local businesses in welcoming and recognizing teachers, the district can display their appreciation for the staff that invests their time teaching the students of MISD. By further developing a teacher induction and mentoring program and professional development that addresses the needs of new teachers, the district will also show teachers that it truly cares about and wants to support each of them. Additionally, as part of this plan, the district should regularly review teacher salaries and compare them to other area school districts to ensure MISD is competitive with its neighbors.

Finally, MISD should conduct their exit surveys in person as part of the exit process and analyze the feedback. Information from the exit interviews would provide MISD with responses that can be analyzed and incorporated into their recruiting and retention efforts. This recommendation can be implemented with existing resources.

PERSONNEL EVALUATION PROCESS (REC. 19)

MISD's performance evaluation instrument for non-exempt staff is not being used effectively to provide constructive feedback and measure professional growth. Without an effective tool, MISD forgoes the benefits of having a document to serve as a feedback mechanism for employees to elicit behavior change and relay employee expectations, which are key to aligning district goals with staff goals.

Each employee at MISD receives a performance appraisal on an annual basis. MISD has two different performance evaluation instruments: one for exempt employees and one for non-exempt employees. The evaluation instrument used for non-exempt employees lists job tasks from the job description and has a rating scale of exceeds expectations, proficient, below expectations, unsatisfactory, or not applicable for each task statement. The evaluation document uses check boxes indicating whether or not the individual is performing the tasks outlined in their job description. The last page on the evaluation form provides space for goals but doesn't address whether the goals from the prior year were met. Performance expectations are not clearly defined or measurable even though there are sections for employee comments and goals. Managers and employees can have different performance expectations when goals are not clearly defined.

Performance standards identify specific criteria for measuring job performance and provide the employee with a clear understanding of acceptable performance and expectations. Performance standards also allow for objective evaluations which can mitigate potential litigation. Effective performance standards describe performance expectations in terms of timeliness, cost, and quality; specify the acceptable margin for error; and state conditions under which the performance is to be accomplished or assessed. Good performance standards are realistic, specific, measurable, and consistent with district goals.

Measurable performance standards provide the foundation for a formal performance appraisal. An effective performance appraisal process can serve as a counseling tool and improves communications between supervisors and employees.

Evaluating employee performance is a time consuming process that should benefit both the employee and the employer. The performance appraisal process should be more than recording of task results. It should be a performance management tool that identifies expectations and improvement opportunities. Formal performance appraisal systems are designed to accomplish the following:

- maintain or improve employee job satisfaction and morale by letting employees know that their supervisor is interested in their job progress and personal development;

- serve as a guide for planning of further training;

- assure thoughtful opinion of an employee's performance throughout the period in relation to specific goals and assigned tasks;

- provide assistance in determining and recording special skills and capabilities;

- assist in planning personnel moves that will best utilize each employee's capabilities;

- provide an opportunity for each employee to discuss job problems and interests with their supervisor; and

- provide substantiating information to support wage adjustments, promotions, disciplinary action or termination.

Human Resources should revise its non-exempt employee performance evaluation instrument to include department specific and objective performance measures. The performance expectations should be in measurable terms that are collaboratively set by the supervisor and employee, identify developmental activities to achieve, and provide comments from the supervisor and employee. Performance measures should be related not only to the department but also to the achievement of district goals and objectives. Supervisors should be trained in-house on how to establish measurable expectations and how to help employees identify personal development goals. This recommendation can be implemented with existing resources.

JOB DESCRIPTIONS AND RESPONSIBILITIES (REC. 20)

MISD's job descriptions are generally not reflective of responsibilities and tasks actually performed, have incomplete or inconsistent qualifications listed, and in some cases, reflect duplicative tasks. Human Resources has responsibility for development and maintenance of all district job descriptions.

There is no systematic review or process for updating the job descriptions, so job descriptions may not accurately reflect the functions being performed. The district is planning to review and/or modify selected job descriptions in fall 2009.

Job descriptions are the basis for informing individuals of job requirements and should be used to ensure that individuals hired meet minimum requirements. Job descriptions help current employees understand the tasks expected of their position. They also provide a basis for performance evaluations and salary structure. As such, all job descriptions should be developed to include any educational requirements appropriate for the position.

Exhibit 3-6 compares the job description for the Human Resources (HR) department's secretary and the lead position management specialist at the time of the review team's on-site visit to the district. The job description for the HR department's secretary was not reflective of actual responsibilities and tasks performed in that a significant percentage of her time was dedicated to administering the substitute process although her background is strictly clerical. At the time this task needed to be done, she was the only available person in the department. Subsequent to the onsite visit, the district began the process of reviewing and updating job descriptions and has added educational and experience requirements for these two HR positions. Additionally, the job description for the HR lead position management specialist previously included the tasks performed by the Records Management Specialist. The job descriptions have subsequently been modified to reflect the responsibilities for each position. Because of the diversity of the district, certain tasks require special knowledge and experience, particularly the ability to read and speak both English and Spanish. The HR lead position management specialist description now includes this skill as a preferred qualification.

The review of MISD job descriptions noted inconsistencies in the required educational qualifications section. Some job descriptions did not have required qualifications listed and others had incomplete or inconsistent qualifications. For example, district positions without educational requirements indicated on the job description are as follows:

- Director of Athletics

- Assistant Athletic Director

- Social Worker

- Field Supervisor (Transportation)

EXHIBIT 3-6
COMPARISON OF JOB DESCRIPTIONS
HR SECRETARY AND HR LEAD POSITION MANAGEMENT SPECIALIST

SECRETARY	LEAD POSITION MANAGEMENT SPECIALIST
Revision Date: December 2007	**Revision Date:** January 2009
Pay Grade: Clerical/Paraprofessional Level 5	**Pay Grade:** Clerical/Paraprofessional Level 6
Qualifications/Education/Certification: • None listed	**Qualifications/Education/Certification:** • High school diploma or GED • Acceptable score on the district administered "Literacy Test"
Primary Purpose: • Provide clerical support to the director of Human Resources and other staff members; maintain process and operate the substitute placement system, required reports and all substitute personnel records; maintain and process the district workers' compensation claims; file appropriate claim forms and reports.	**Primary Purpose:** • Leading the position management section involves the structuring of positions, functions, and organizations in the HRIS system in a manner that optimizes productivity, efficiency, and organizational effectiveness; receive, process, and maintain files and records for applicants and employees of the district; monitor access to human resource records and maintain proper security and confidentiality.
Special Knowledge/Skills: • Effective communication and interpersonal skills; • Basic math skills; • Proficient skills in keyboarding, word processing and file maintenance; • Ability to use personal computer and software to develop spreadsheets, databases and do word processing.	**Special Knowledge/Skills:** • Effective communication and interpersonal skills; • Basic math skills; • Proficient skills in keyboarding, word processing, and file maintenance; • Maintain high level of confidentiality; • Ability to use personal computer and software to develop spreadsheets and databases and do word processing.
Experience: • None listed.	**Experience:** • Three years clerical experience, preferably in a public education environment, preferably in human resources.
Duties and Responsibilities: • Receive all incoming calls to HR office, route calls to the appropriate staff or department and take reliable messages. • Prepare correspondence, forms, records, and reports as directed using personal computer. • Run DPS Criminal Record Checks for new hire, substitutes. • Process all district substitute applications and required documents, enter data in Skyward. • Collect all school district required documents (demographic, I-9, Attorney General New Hire Report Form, Drug Free Policy and W-4). • Prepare annual Reasonable Assurance letters for current and active substitutes. • Prepare and update substitute list for each school year and maintain application of active and inactive substitutes. • Assist with processing all new hires. • Process request for official district record, including maintaining log of requests for records, retrieving documents, copying and mailing records.	**Duties and Responsibilities:** • Maintain the HRIS position management system to isolate personnel data entry from payroll data entry. • Maintain HRIS campus/department staffing assignment codes, budget codes, campus codes, certification and NCLB information, transcript information and demographic information. • Organize staffing needs by defining job or position code requirement within the HRIS system. • Maintain, track and run reports on position history, and position information such as the employee type, location, pay code, salary range and standard benefits and deductions. • Track all current position assignments and pay grades to ensure accuracy of associated pay rates for employees. • Track, maintain and run reports on historical date. • Monitor campus/department staffing request, ensure documentation for vacant or new positions are allocated on the HRIS system.

EXHIBIT 3-6 (CONTINUED)
COMPARISON OF JOB DESCRIPTIONS
HR SECRETARY AND HR LEAD POSITION MANAGEMENT SPECIALIST

SECRETARY	LEAD POSITION MANAGEMENT SPECIALIST
Duties and Responsibilities (Continued):	**Duties and Responsibilities (Continued):**
• Receive DLC schedule of events and make sure set-ups are completed by assigned district custodian.	• Maintain files for all employees and applicants, including receiving and routing of changes (i.e. Name, address changes).
• Process and submit department purchase orders and work orders.	• Receive and process applications, including verifying completeness of files, processing of new hire paperwork.
• Manage reception area process and procedures and assist the receptionist as needed.	• Enter new hire information; update employee information; and process separation in Skyward.
• Performed Inter District Transfers through 07/08.	• Maintain employee service records.
• Perform other duties as assigned.	• Manage the records storage and destruction process for the HR records following established records retention schedule and requirements of the Texas State Library and Archives Commission.
	• Assist with the purging of records and coordination of inactive HR records according to the district's records and retention plan.
	• Prepare correspondence, forms, records, and reports as directed using personal computer.
	• Compile pertinent data as needed when preparing various federal, state, and local reports.
	• Assist with the preparation and distribution of employment contracts.
	• Assist, prepare and maintain certifications
	• Assists with administrative duties.
	• Perform other duties as assigned.

SOURCE: MISD job descriptions, March 2009.

Human Resources should update all job descriptions currently being used by the district. This effort will provide objectivity and ensure that job descriptions reflect industry standards for required education, skills, and qualifications. Job descriptions should be provided to the hiring principal or department supervisor for review and addition of unique skills needed, providing for an independent evaluation of the responsibilities and elimination of any duplicative tasks. This recommendation will also help ensure that the district is hiring individuals best qualified to perform the tasks traditionally associated with the position. Current employees could be grandfathered into meeting educational requirements for the position currently held.

Because of the district's significant growth, these descriptions should be updated regularly incorporating functional department feedback. This recommendation can be implemented with existing resources.

HUMAN RESOURCES TRAINING (REC. 21)

Human Resources personnel may not have all of the professional training necessary to efficiently perform their assigned tasks. The Human Resources Department is organized according to functional areas such as compensation, job analysis and staffing, evaluation and development. Human Resources (HR) has eight budgeted positions, one of which was vacant in March 2009 when the review team conducted onsite interviews.

Certain HR functions, such as management of the substitute tracking system, are currently performed by Business Office personnel instead of HR staff. AESOP is an automated substitute calling system MISD has used since August 2007 which is provided by a private vendor for K–12 school districts. It is managed by the payroll clerk in the Business Office, although the HR staff manually handles the clerical tasks associated with hiring and placing substitutes throughout the district. The district plans to target full staff

utilization of AESOP by the fall 2009 to assist with tracking and recording absentee records.

Human Resources should be responsible for all human resource functions except staff development for instructional staff, payroll processing, risk management, and safety training. Because some of the HR functions presently may be performed by Business Office staff, the HR Department is not operating in the most efficient manner.

MISD should fill the vacant position in HR. This position could help the HR department to be more efficient and effective in handling all the personnel related needs of the district.

MISD's Human Resources Department is responsible for the following activities:

- Complying with federal and state employment regulations;

- Conducting salary and benefit surveys and developing competitive salary schedules and benefits packages;

- Administering the approved salary and benefits system;

- Developing and maintaining the district's employee classification system;

- Developing and assisting with updating job descriptions;

- Developing and updating the employee handbook;

- Developing and maintaining staffing formulas;

- Administering the district's position control system;

- Administering the employee grievance process;

- Processing EEOC and OCR complaints;

- Facilitating the employee performance appraisal process;

- Recruiting qualified employment candidates;

- Establishing and maintaining employee records;

- Processing personnel action forms;

- Administering and monitoring the teacher certification and permit process;

- Issuing contracts, letters of assurance, and non-renewals;

- Hiring, training, and placing new employees and substitute teachers;

- Preparing required state reports; and

- Preparing monthly board reports.

Several HR functions are performed by certain HR staff just because they have always performed them or because there was no one else available. Functions should be assigned to the staff with the appropriate skill set to handle the tasks. HR personnel in current positions may not have the educational or professional training to perform all of those tasks. For example, the HR Department secretary, who does not and is not required to have an HR background, is currently responsible for managing the substitute staffing process.

To effectively manage the human resources function, many private organizations are requiring prospective human resources specialists to take courses in compensation, recruitment, training and development, and performance appraisal, as well as courses in principles of management, organizational structure, and industrial psychology. Other courses often required include business administration, public administration, psychology, sociology, political science, economics, and statistics.

The HR executive director should evaluate training needs for HR staff and require staff to receive training necessary to effectively meet the district's changing personnel needs. Since the onsite visit, the district has indicated that the HR administrative team has had training in the areas of compensation, recruitment, performance appraisal, management, and industrial psychology. The HR executive director should continue to evaluate and ensure that all HR staff receive regular training associated with their responsibilities and encourage them to attend annual HR-related conferences.

The Society of Human Resources Management (SHRM) offers certification courses in a variety of core human resources topics. These include human resources development orientation, global HR, total rewards compensation, benefits, workforce planning/employment, personal/professional growth/development, risk management, and developing a generalist perspective. The certification courses are offered at seminars around the country, during regional conferences, or by requesting a local on-site training session.

One possibility would be attendance at a regional conference, which would provide a cost effective source of training for Human Resources staff because of the multiple seminar

choices available. The non-member conference fee is approximately $800 per person and each certification class is approximately $1,200 for non-members.

The financial impact of implementing this recommendation is an annual training cost of $1,900 per employee per year for training. The district could spread out training costs by sending different staff each year. Total annual costs would be $3,800 [($800 per annual conference + $1,100 travel costs) x 2 staff].

EFFECTIVE HUMAN RESOURCE COMMUNICATIONS (REC. 22)

Human Resources does not ensure that employee-related district procedures are consistently disseminated across all campuses and are up-to-date with current statutory requirements, district policies, and applicable forms. According to the HR assistant director, the MISD employee handbook has been drafted but not finalized due to time and resource constraints within the Human Resource Department. The department began working on the initial handbook draft in 2007 to distribute to employees in 2008–09; however, other more critical projects postponed the completion and subsequent distribution.

Additionally, discussions with HR staff indicated there is no district mandate that all human resource communication be in both English and Spanish. Certain HR documents and forms are provided in English and Spanish, but critical handbook information, if not required to be translated, may not be appropriately interpreted by all staff.

Employee handbooks are a valuable resource for all district employees. The handbooks provide employees with a copy of district goals, policies, procedures, regulations, and benefits. An employee handbook provides a format for presenting a synopsis of personnel policies. If an employee needs the policy in its true form, the handbook may assist them in locating it. Failure to provide an up-to-date handbook to all employees may lead to inconsistencies in implementing district policies and requirements. It may also lead to legal challenges from staff and parents, so it is important that the handbook be carefully worded and reviewed by legal counsel.

MISD should complete the development of a comprehensive district employee handbook containing up-to-date employee-related policies with current law, district policies, and applicable forms. This handbook can be distributed to employees on the district intranet, or in a printed version

distributed at the beginning of each school year. Since the onsite visit, the district stated that the procedures manual development is in progress, and the Human Resources Department plans to review the manual with new administrators and staff upon its completion. The district is also planning to meet with administrators annually on procedural changes during staff development.

Once completed, the district should update the handbook annually. The Human Resources Department should work with campus administrators to ensure that campus-level employee handbooks are up-to-date and align with the district-level handbook.

To avoid legal implications, but more importantly, to ensure that all district staff are thoroughly informed about district policies, the district should evaluate if there is a need for requiring basic and critical information to be communicated in both English and Spanish. If so determined, MISD could translate the employee handbook and other district communication into Spanish. This task could be assigned to the MISD bilingual department to avoid costs. This recommendation can be implemented with existing resources.

HUMAN RESOURCES PROCEDURES MANUAL (REC. 23)

Manor ISD does not have a Human Resources Procedures Manual. The document HR provides to employees to serve as a manual consists of a series of HR system screen prints highlighting items the staff should enter or check off when entering new personnel. It is not comprehensive nor does it contain detailed descriptions of how to perform daily tasks. The screen prints do provide general information, but lack detailed information that new or current employees could use to effectively perform daily human resource functions.

Effective procedures manuals should serve as a guide for implementing district policies, as well as operational procedures, as set forth by the board. The administrative procedures manual is usually comprised of human resource and district policies and required human resource department forms. Procedure manuals are a source of knowledge transfer and assist in training employees. A detailed administrative procedure manual helps new employees learn the processes and serves as a reference for all current and future department employees. Adherence to these processes can also serve as part of the performance evaluation tool in that employees can be partially evaluated based upon their adherence to procedures.

In addition, well-written procedures protect institutional knowledge of an organization. The procedure manual, once finalized, can include cross references, revision dates, and the name and signature of the person who reviewed or revised the specific section. This information allows users to determine the timeliness and accuracy of the administrative information.

The district should develop a detailed procedures manual to include all processes and procedures conducted within Human Resources. The logical starting point would be for the HR executive director and assistant director to develop an outline of processes and procedures to be included in the manual.

They should then assign each staff member their respective processes to develop written step-by-step procedures. Each employee should also start a log of daily activities. This log could be used to identify additional processes that should be included in the manual. All procedures would then be combined into one manual and finalized by the HR executive director. The manual should be completed by December 2009, reviewed on an annual basis, and updated as needed. This recommendation can be implemented with existing resources.

FISCAL IMPACT

RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
18. Further develop teacher recruitment efforts and pursue multiple strategies to improve the teacher retention rate.	$0	$0	$0	$0	$0	$0	$0
19. Revise non-exempt employee performance evaluation instruments to include department specific and objective performance measures.	$0	$0	$0	$0	$0	$0	$0
20. Update all job descriptions currently being used by the district.	$0	$0	$0	$0	$0	$0	$0
21. Evaluate training needs for Human Resource staff and require staff to receive training necessary to effectively meet the district's changing personnel needs.	($3,800)	($3,800)	($3,800)	($3,800)	($3,800)	($19,000)	$0
22. Complete development of a comprehensive district employee handbook containing up-to-date employee-related policies with current law, district policies, and applicable forms.	$0	$0	$0	$0	$0	$0	$0
23. Develop a detailed procedures manual to include all processes and procedures conducted within Human Resources.	$0	$0	$0	$0	$0	$0	$0
Totals	**($3,800)**	**($3,800)**	**($3,800)**	**($3,800)**	**($3,800)**	**($19,000)**	**$0**

CHAPTER 4

FACILITIES CONSTRUCTION, USE AND MANAGEMENT

MANOR INDEPENDENT SCHOOL DISTRICT

CHAPTER 4. FACILITIES CONSTRUCTION, USE AND MANAGEMENT

School facilities must be adequately planned to create an environment that supports educational programs. School construction and renovation projects must be executed properly to ensure they are on schedule and remain within budget. Maintenance programs must be designed to coordinate preventive maintenance and repairs to ensure that facilities are in working order to provide an atmosphere that is conducive for learning. Custodial operations should provide for the general cleanliness and upkeep of facilities on a daily basis. An energy management program should be in place to provide for effective and efficient use of utilities by developing energy conservation practices and monitoring energy costs and usage.

Manor Independent School District (MISD) has 11 schools, a new administration building, a current administration building, a maintenance warehouse, and a transportation building that encompasses 1.3 million square feet of space and houses 6,327 students and 970 employees. Of the district's 970 employees, 19 maintenance and craftsman support the Environmental Services Department, which

oversees facilities maintenance and 58 staff support custodial operations. The average age of MISD's facilities is 16 years.

MISD's Environmental Services Department reports to the deputy superintendent. The director of the Environmental Services Department oversees the department and is supported by a secretary. The director administers school construction bond programs; facilitates the district's long range facilities planning; oversees the district's architect in the development of specifications for facilities administration of construction contracts; and monitors the construction process to ensure quality expectations of the district.

Exhibit 4-1 displays MISD's organizational chart for the Environmental Services Department.

MISD's student enrollment has increased dramatically, rising by about 65 percent in the past five years (2003–04 to 2008–09). As a result, the district has built new facilities and expanded and modernized many of its older facilities to keep MISD current with the needs of the changing community demographics, and changing needs for instructional environments. Manor High School was constructed in 1998

EXHIBIT 4-1
ENVIRONMENTAL SERVICES ORGANIZATIONAL CHART
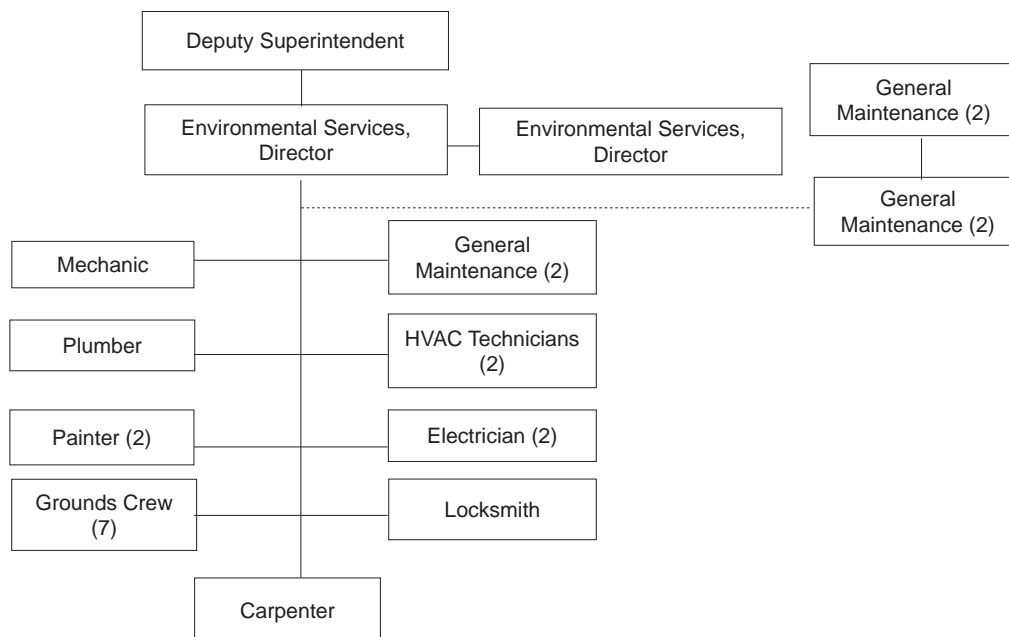
SOURCE: MISD Environmental Services Department, March 2009.

with renovations in 2000, 2007, and 2008. Manor New Tech High School, formerly the district's original high school campus, presently offers academic programming that focuses on technology-based learning. The building was constructed in 1965 with renovations in 1976, 1986, 1991, 1994, 2007, and 2008. The Excel/MAP facility serves the district's alternative education programs and was constructed in 1954 with renovations in 1960, 1981, 1986, and 1997. The Excel/MAP facility is the only district campus that needs cosmetic renovations.

The district has two middle schools: Manor Middle School, which was constructed in 2006, and Decker Middle School, which was constructed in 2008. MISD has six elementary schools. Bluebonnet Trail Elementary was constructed in 1992, with renovations in 1996 and 2007, and Decker Elementary School was constructed in 1998. Both Manor Elementary and Blake Manor Elementary Schools were constructed in 2006. Presidential Meadows Elementary School was constructed in 2007, while Oak Meadows Elementary School was constructed in 2008. The district has plans to open another school, Pioneer Crossing Elementary, in 2009–10.

ACCOMPLISHMENTS

- MISD developed a comprehensive, long-range facilities plan (Strategic Planning Study) in August 1999 that has guided the district through multiple successful capital improvement programs.

- MISD performs annual demographic projections, enabling the district to accurately forecast its student population.

- MISD has effectively implemented building prototypes and facilities building standards as a cost control measure for building new and renovating existing facilities.

- MISD's Environmental Services Department has achieved high satisfaction levels for maintenance operations with district stakeholders.

FINDINGS

- MISD's site selection process prioritizes land costs at the expense of other factors such as student accessibility and transportation costs.

- MISD has not developed a space utilization plan to optimize existing classroom space (including

portables) and to determine the timeframe for continuing its school building program.

- MISD does not have a preventive maintenance program for its facilities.

- The Environmental Services Department does not fully utilize its automated work order system to help prioritize and track its work orders electronically.

- Material standards have not been developed for regular maintenance items such as plumbing parts, carpet, wall coverings, and light fixtures that are used in standard building renovations.

- MISD does not perform a formal cost-benefit analysis to determine the relative value of in-house operations.

- MISD's Environmental Services Department has no formal model in place to determine staffing requirements for facilities-related functions.

- MISD does not have a formal Energy Management Program.

RECOMMENDATIONS

- **Recommendation 24: Evaluate the process for selecting school sites using additional factors such as student accessibility and the cost of transporting all district students to school.**

- **Recommendation 25: Develop a space utilization plan to balance and optimize enrollment at schools.**

- **Recommendation 26: Develop and implement a preventive maintenance program for the district's facilities.**

- **Recommendation 27: Fully implement the work order system to process, prioritize, and analyze work order requests.**

- **Recommendation 28: Develop material standards for items such as plumbing parts, carpet, wall coverings and light fixtures that are used in building construction and renovation.**

- **Recommendation 29: Implement a process to perform regularly scheduled cost-benefit analysis for such operational areas as custodial operations**

for nightly cleaning, periodic grounds operations, and maintenance operations.

- **Recommendation 30: Develop a staffing allocation model for both maintenance and custodial staff to ensure proper labor productivity.**

- **Recommendation 31: Develop a formal Energy Management Program.**

DETAILED ACCOMPLISHMENTS

LONG-RANGE FACILITIES PLAN

MISD developed a comprehensive, long-range facilities plan (Strategic Planning Study) in August 1999 that has guided the district through multiple successful capital improvement programs. This plan proactively prepared Manor for the district's rapid growth. Since 1992, the district has contracted with an educational facility planning and construction program management firm to assist with the district's long-range facilities planning and capital improvement programs, including development of the plan. The general process the educational facility planning and construction program management firm used for MISD follows:

- review and evaluate the district's and community members' needs and desires regarding educational programs and instructional objectives and build a long-range facilities plan;

- involve a minimum of 40 to 60 community stakeholders from a broad cross-section of community members to assist with the development of facilities plan objectives;

- build consensus with an even broader group of community stakeholders and enable them to develop a plan that reflects school board and communities' self-interest;

- arrange facilities tours within Manor ISD and other districts to review examples of facilities designs; and

- develop and disseminate (direct mail campaign to each Manor community stakeholder) a comprehensive brochure that contains concise collateral materials regarding the capital improvement/bond programs so that informed decisions can be made when necessary.

The initial plan components and periodic updates covered the following:

- Strategic Planning Process;

- Instructional/Learning Committee;

- Growth Committee;

- Campus Profiles;

- Existing Conditions;

- Community Meeting Notes;

- Educational Specification Recommendations;

- Capital Improvement Plans;

- Preliminary Recommendations; and

- Task Force Process.

Exhibit 4-2 shows MISD's Long Range Facilities Plan and summarizes projected construction facilitated through bond elections. The summarized bonds include the 2007 bond that allowed the construction of Decker Middle School and Presidential Meadows Elementary. The bonds summarized are scheduled for 2010 and 2013.

EXHIBIT 4-2
MISD LONGE RANGE FACILITIES PLAN

Manor Independent School District
Long Range Facilities Plan

Budgets	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015
2007 Bond		✱ May 2007 Bond								
$13,902,400		New ES to open '08							2007 Bond	
$24,751,200		New MS to open '08							$111,525,000	
$19,166,974		HS Addn. opens '08							Including issuance	
$15,900,000		New ES to open '09		Samsung Site					costs	
$3,000,000		Convert MMS Main for Central Admin								
$5,050,000		Districtwide Technology & Security Upgrades								
$16,160,000				New ES pushed back to open '11			Dwyer Donation - Central Site			
$990,000				15 New Buses						
$3,120,000				Land for New MS to open '13						
$1,560,000				Land for New ES to open '12						
$6,240,000				Land for New HS to open '15						
$109,840,574	Total '07 Bond									
2010 Bond						✱ November 2010 Bond				
$19,200,000						New ES to open '12		Need to acquire - Southeast Quadrant		
$36,840,000						New MS to open '13		Kingsgate Site		
$22,160,000						New ES to open '13		Need to acquire - Sendero Hills		
$78,200,000	Total '10 Bond									
2013 Bond								✱ November 2013 Bond		
$23,560,000						New ES to open '14 - Need to acquire - Pioneer Crossing				
$24,960,000						New ES to open '15 - Dwyer Donation				
$74,592,000					New HS to open '15 with core for 1,800, classrooms for 1,200 - Campbell Tract					
$123,112,000	Total '13 Bond									
PK-5 Enrollment**	3210	3433	4007	4618	5385	6161	6977	7938	8980	10069
Revised 03/08		3393	3741	4115	4631	5127	5741	6464	7274	8148
Revised 012/08										
PK-5 Capacity	2800	3500	4200	4900	4900	5600	6300	7000	7700	8400
6-8 Enrollment**	1055	1154	1335	1543	1674	2036	2380	2908	3293	3673
Revised 03/08		1147	1263	1431	1520	1737	1872	2122	2423	2790
Revised 12/08										
6-8 Capacity	900	900	1800	1800	1800	1800	1800	2700	2700	2700
9-12 Enrollment**	1127	1215	1250	1423	1596	1738	2045	2214	2646	3098
Revised 03/08		1288	1391	1507	1660	1832	2051	2205	2485	2785
Revised 12/08										
9-12 Capacity	800	1200	2200	2200	2200	2200	2200	2200	2200	3400
Total Projected Enrollment	5392	5802	6592	7584	8655	9935	11402	13060	14919	16840
Revised 03/08		5828	6395	7053	7811	8696	9664	10791	12182	13723
Revised 12/08										

**ENROLLMENT PROJECTIONS PER FEBRUARY 2007 DEMOGRAPHICS REPORT

Average ES Enrollment			624	588	662	641	638	646	661	679
Average MS Enrollment			632	716	760	869	936	707	808	930

SOURCE: MISD Management Team, March 2009.

Exhibit 4-3 presents a diagram of the district's facilities planning process.

EXHIBIT 4-3
MISD LONG-RANGE FACILITIES PLANNING PROCESS DIAGRAM
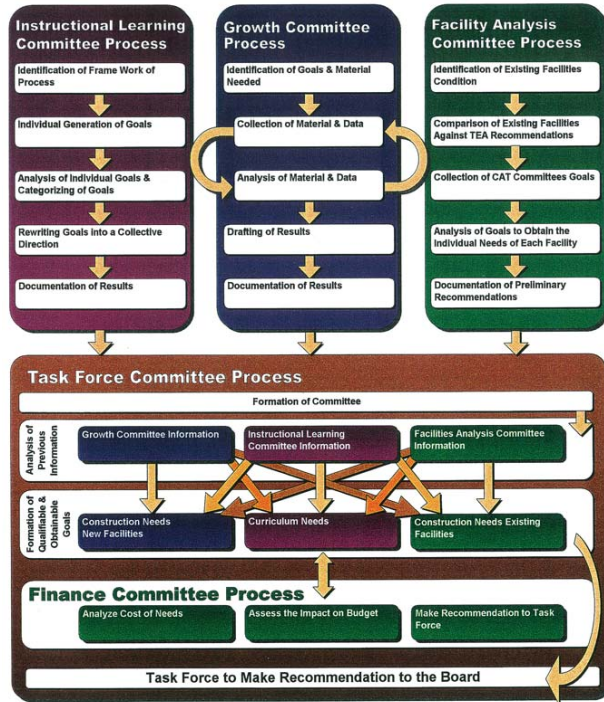
SOURCE: MISD Strategic (Facilities) Study, August 1999.

Since 2004, MISD has executed bond programs totaling $196 million ($48 million in 2004; $36 million in 2006; and $112 million in 2007). The last three MISD bond campaigns were passed by the voters at a rate of 60 percent or higher, even though they all involved a tax increase. **Exhibit 4-4** through **Exhibit 4-6** provides the breakdown for MISD's 2004, 2006, and 2007 bond referendums.

MISD's comprehensive, long-range facilities plan ensures proper coordination of the district's facilities and educational programs; community expansion plans; building costs and capital requirements; and design guidelines.

EXHIBIT 4-4
MISD 2004 BOND REFERENDUM ALLOCATION

PROPOSITION	DESCRIPTION	AMOUNT
Proposition 1	New Elementary School to Replace Manor Elementary School	$11,000,000
	New Middle School to Replace Manor Middle School	$17,000,000
Proposition 2	New Elementary School	$11,000,000
Proposition 3	Additions to Manor High School	$6,122,007
Proposition 4	Technology Enhancements	$1,500,000
Proposition 5	Land Purchase for Future School Sites	$750,000
	Transportation Upgrade	$750,000
Total All Propositions		$48,122,007

SOURCE: MISD Bond Brochure, 2004.

EXHIBIT 4-5
MISD 2006 BOND REFERENDUM ALLOCATION

PROPOSITION	DESCRIPTION	AMOUNT
Proposition 1	New Elementary School which may open in 2007	$12,830,000
Proposition 2	Land and Design Costs for New Elementary School which may open in 2008	$6,220,000
	Land and Design Costs for New Middle School which may open in 2008	
	Design Costs for Addition to Manor High School – Capacity to 1,800	
Proposition 3	Improvements to Bluebonnet Trail Elementary, including expansion to the cafeteria and a new gym	$1,395,000
Proposition 4	New Stadium/Transportation Expansion	$15,450,000
Total All Propositions		**$35,895,000**

SOURCE: MISD Bond Brochure, 2006.

EXHIBIT 4-6
MISD 2007 BOND REFERENDUM ALLOCATION

PROPOSITION	DESCRIPTION	AMOUNT
Proposition 1	New Elementary School for 2008	$58,690,000
	New Middle School for 2008	
	Manor High School Addition for 2008 – Capacity to 1,800	
Proposition 2	New Elementary School for 2009	$43,630,000
	New Elementary School for 2010	
	Land for Future Sites	
Proposition 3	Districtwide Technology	$6,135,000
	Security Upgrades to All Campuses New Buses	
Proposition 4	Convert Old Manor High School Main Building for Central Support Services	$3,070,000
Total All Propositions		**$111,525,000**

SOURCE: MISD Bond Brochure, 2007.

ANNUAL DEMOGRAPHIC PROJECTIONS

MISD performs annual demographic projections, enabling the district to accurately forecast its student population. The district uses these projections to help develop and execute a construction program that keeps pace with the projected growth. MISD contracts with Population and Survey Analysis to regularly conduct demographic studies. The most recent demographic study was completed in December 2008 and had several objectives that include:

- evaluating historical trends in student population;

- providing long-term projections of single-family housing and of multi-family housing within the school district's boundaries;

- providing growth scenarios of district-wide enrollment projections by grade and grade-group;

- providing enrollment projections for each of the district's planning units; and

- assessing relief needs for schools that may become overcrowded, based on student projections, and determine potential demand for new school sites.

The MISD demographic study provides the district with three growth scenarios. This enables the district to evaluate

projected school enrollment during its facility planning process. The three growth scenarios are: (1) low growth scenario; (2) most likely growth scenario; and, (3) high growth scenario. Using the various growth scenarios allows the district to take various approaches to facility planning ranging from conservative to aggressive.

Exhibit 4-7 displays the district's historical growth for an eight-year period from 2001 to 2008. The district saw its two largest increases in the 2004 and 2005 school years. The 2004 school year had the second largest growth with an increase of 601 students, a percentage increase of 18.6 percent. The 2005 school year had an increase of 721 students, a percentage increase of 18.8 percent. The student population continued to grow rapidly in the 2006 and 2007 school years with growth of 12.0 percent and 14.3 percent, respectively. Growth slowed to 403 students or 6.9 percent during the 2008 school year. Overall enrollment grew by 3,387 students between 2001 and 2008.

EXHIBIT 4-7
MISD ENROLLMENT HISTORY 2001 THROUGH 2008

YEAR END	ENROLLMENT	PERCENT INCREASE
2001	2,844	Base year
2002	3,020	6.2%
2003	3,227	6.8%
2004	3,828	18.6%
2005	4,549	18.8%
2006	5,098	12.0%
2007	5,828	14.3%
2008	6,231	6.9%
Overall increase from 2001 to 2008	**3,387**	**119.1%**

SOURCE: MISD Demographic Study, 2008 Update.

Exhibit 4-8 shows the projected growth as estimated by the district's demographers. Enrollment projections show steady growth ranging between approximately 6 and 8 percent.

Exhibit 4-9 compares MISD's historical enrollment projections for the five-year period between 2003–04 and 2007–08 and actual enrollment trends for the same period.

Enrollment projections have assisted the district in performing long-range facilities planning, determining the lead-time necessary for opening new schools and balancing enrollment at existing schools. The current enrollment projections show that MISD will have to recommence its building program in

EXHIBIT 4-8
MISD ENROLLMENT PROJECTIONS
2009 THROUGH 2016

YEAR END	ENROLLMENT	PERCENT INCREASE
2009	6,448	Base year
2010	6,893	6.9%
2011	7,325	6.3%
2012	7,793	6.4%
2013	8,303	6.5%
2014	8,869	6.8%
2015	9,555	7.7%
2016	10,282	7.6%
Projected increase from 2009 to 2016	**3,834**	**59.5%**

SOURCE: MISD Demographic Study, 2008 Update.

2011 to accommodate anticipated enrollment growth expected by 2013.

BUILDING PROTOTYPES

MISD has effectively implemented building prototypes and facilities building standards as a cost control measure for building new and renovating existing facilities. Prototype designs help to ensure that each classroom type and instructional support facility such as media center libraries, cafeterias and kitchens are functional and maximize space. Building prototypes were effectively used for the following schools:

- Manor Middle School;

- Decker Middle School;

- Manor Elementary School;

- Blake Manor Elementary School;

- Presidential Meadows Elementary School; and

- Oak Meadows Elementary School.

MISD began building 700 student capacity elementary schools and 900 student capacity middle schools in 2006, and that design has remained in use through the construction of elementary schools completed in 2008.

The district modifies elementary and middle school prototype designs as needed to adapt each new school to its site and the specific educational programs that will be implemented at the school. The district's new elementary school, which is currently under construction, was intended to follow the district's elementary prototype design; however, land restrictions for the design caused it to be built as a two-story campus instead. The result of the new design was that the district now has a two-story elementary prototype design for future schools with land restrictions.

Exhibit 4-10 presents sample prototype designs for MISD elementary and middle schools.

Through the use of prototype designs, MISD has been able to execute an effective cost-control and delivery schedule for

EXHIBIT 4-9
MISD HISTORICAL ENROLLMENT PROJECTIONS
AND ACTUAL ENROLLMENT TRENDS
2003–04 THROUGH 2007–08

HISTORICAL ENROLLMENT PROJECTIONS	ACTUAL ENROLLMENT
2008 — 5,672	2008 — 6,231
2007 — 4,969	2007 — 5,828
2006 — 4,363	2006 — 5,098
2005 — 3,814	2005 — 4,549
2004 — 3,222	2004 — 3,828
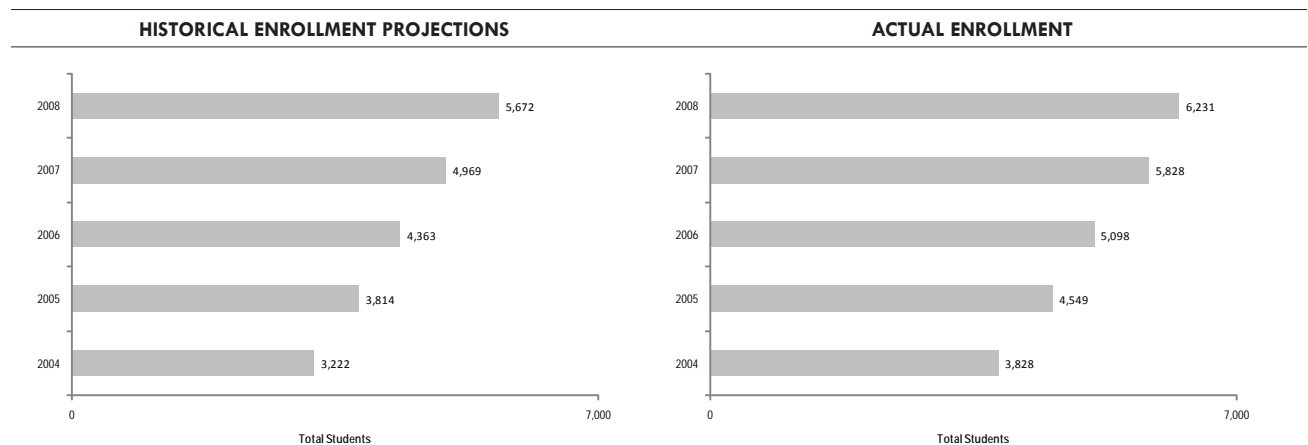
SOURCE: MISD Demographic Study Data from Population and Survey Analysis (2008 Update) and Enrollment Trend Data from Academic Excellence Indicator System (AEIS), 2003–04 through 2007–08.

EXHIBIT 4-10
MISD SAMPLE PROTOTYPE DESIGNS FOR ELEMENTARY AND MIDDLE SCHOOLS

MISD STANDARD PROTOTYPE DESIGN FOR ELEMENTARY SCHOOLS	MISD STANDARD PROTOTYPE DESIGN FOR MIDDLE SCHOOL
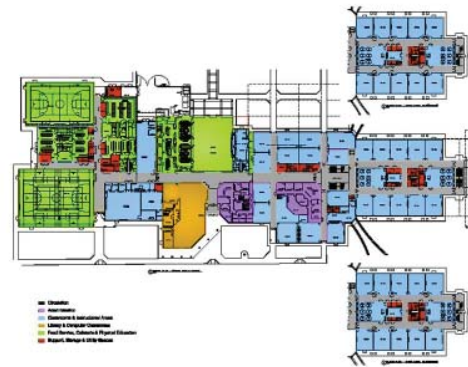
Source: MISD and BLGY Architects, 2006.

its construction projects. According to district leadership, all of the campuses that have been built over the past five years have been on time and under budget. During construction, the district monitors several items such as:

- Project schedule – which indicates the project's percentage of completion;

- Project updates – which documents the project's work status;

- Major construction issues – which documents any project delays; and

- Targeted completion date – which documents estimated project completion.

According to Manor ISD leadership, a typical elementary school built by the district in 2006 and 2008 and based on the prototype design was 80,000 square feet and was built at a cost of $123 per square foot. The typical middle school built in 2008 was 137,000 square feet and was also constructed at a cost of $123 per square foot.

By using prototype designs, the district has generated savings of $1.3 million for its elementary schools and a savings of $2.3 million per middle school.

MISD construction cost per square foot is the lowest among both central Texas area school districts and the statewide average, as exemplified in **Exhibit 4-11**. This comparison further reinforces how the use of school building prototypes has helped keep MISD's construction costs low.

EXHIBIT 4-11
COMPARATIVE SCHOOL SYSTEM SCHOOL CONSTRUCTION COST FOR MANOR ISD AND CENTRAL TEXAS SCHOOL DISTRICTS

SCHOOL DISTRICT	COSTS PER SQUARE FOOT
Hutto ISD	$128
Pflugerville ISD	$133
Frisco ISD	$141
Comal ISD	$151
Belton ISD	$154
Cleburne ISD	$129
Central Texas Schools Average	$139
Manor ISD	**$123**
Statewide Average	**$129**

Source: MISD's Environmental Services Department, Board Presentation.

HIGH SATISFACTION LEVELS FOR MAINTENANCE OPERATIONS

MISD's Environmental Services Department has achieved high satisfaction levels for maintenance operations with district stakeholders. MISD's stakeholder survey results show that the district's school management (principals and assistant principals), district administration, teachers, and students gave positive ratings to the district for overall facilities planning and felt that the maintenance function performs high quality work and provides good response times for day-to-day maintenance needs.

Exhibit 4-12 shows that 71 percent of principals and assistant principals felt parents, citizens, students, faculty, staff, and the board provide input into facility planning. Forty-five percent of teachers and 28 percent of administrative and

EXHIBIT 4-12
SURVEY QUESTION: PARENTS, CITIZENS, STUDENTS, FACULTY, STAFF, AND THE BOARD PROVIDE INPUT INTO FACILITY PLANNING.

SURVEY RESPONDENTS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
Principals/Assistant Principals	8%	63%	25%	4%	0%
Teachers	9%	36%	37%	14%	4%
Administrative & Support Staff	7%	21%	51%	15%	6%

SOURCE: MJLM Survey, March 2009.

support staff responding to the survey felt that parents, citizens, students, faculty, staff, and the board provide input into facility planning.

Exhibit 4-13 indicates that 100 percent of principals and assistant principals, 88 percent of teachers, 74 percent of administrators and support staff, and 47 percent of MISD students responding to the survey felt that MISD school facilities are clean.

Exhibit 4-14 shows that 92 percent of principals and assistant principals and 74 percent of teachers responding to the survey felt that MISD school buildings are properly maintained in a timely manner. Additionally, 68 percent of

administrators and support staff and 54 percent of students responding to the survey felt that MISD school buildings are properly maintained in a timely manner.

Exhibit 4-15 shows that 88 percent of principals and assistant principals, 66 percent of teachers, and 57 percent of administrators and support staff responding to the survey felt that repairs are made to MISD school buildings in a timely manner. Additionally, 36 percent of students responding to the survey felt that repairs are made to MISD school buildings in a timely manner. Forty-six percent of MISD students responding to the survey felt that repairs to school buildings were not made timely.

EXHIBIT 4-13
SURVEY QUESTION: SCHOOLS ARE CLEAN.

SURVEY RESPONDENTS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
Principals/Assistant Principals	17%	83%	0%	0%	0%
Teachers	20%	68%	5%	7%	0%
Administrative & Support Staff	27%	47%	18%	7%	1%
Students	8%	39%	15%	33%	5%

SOURCE: MJLM Survey, March 2009.

EXHIBIT 4-14
SURVEY QUESTION: BUILDINGS ARE PROPERLY MAINTAINED IN A TIMELY MANNER.

SURVEY RESPONDENTS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
Principals/Assistant Principals	17%	75%	8%	0%	0%
Teachers	15%	59%	11%	13%	2%
Administrative & Support Staff	24%	44%	22%	8%	2%
Students	9%	45%	17%	29%	0%

SOURCE: MJLM Survey, March 2009.

EXHIBIT 4-15
SURVEY QUESTION: REPAIRS ARE MADE IN A TIMELY MANNER.

SURVEY RESPONDENTS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
Principals/Assistant Principals	21%	67%	4%	8%	0%
Teachers	12%	54%	7%	18%	9%
Administrative & Support Staff	15%	42%	28%	11%	4%
Students	6%	30%	18%	38%	8%

SOURCE: MJLM Survey, March 2009.

Exhibit 4-16 shows that 88 percent of principals and assistant principals and 63 percent of administrators and support staff responding to the survey felt that emergency maintenance situations are handled promptly. Additionally, 73 percent of teachers and 48 percent of students responding to the survey felt that emergency maintenance is handled promptly. Twenty-nine percent of MISD students responding to the survey felt that emergency maintenance was not handled promptly.

Exhibit 4-17 shows that 67 percent of principals and assistant principals responding to the survey felt that procedures for submitting work orders are clearly defined by the Environmental Services Department. Sixteen percent felt that procedures for submitting work orders were not clearly defined, while 17 percent did not have an opinion.

MISD's facilities management staff attributes the delivery of high quality service to the following:

- an inclusive facility planning process that actively involves district stakeholders;

- well qualified and well-trained maintenance staff;

- well-supervised maintenance projects that monitor progress, quality, and cost throughout the maintenance process;

- direct reporting relationship for school principals and custodians so that school cleanliness needs are always understood and met; and

- attentive, responsive maintenance and custodial staff who are dedicated to performing high quality work.

By providing timely, quality facility planning, maintenance, and cleaning services for MISD schools, MISD will ensure cost-effective maintenance operations and prolong the functionality of its buildings.

DETAILED FINDINGS

SITE SELECTION (REC. 24)

MISD's site selection process prioritizes land costs at the expense of other factors such as student accessibility and transportation costs. MISD selected most of its school sites based on the available land being donated or discounted for the district. As a result, several district campuses have been built near commercial areas, near heavily travelled roads, or near waste treatment facilities.

Many of the district's schools have been built on sites that are not easily accessible for students causing its students to rely on district provided transportation rather than having the ability to walk to school. For example, many of the district's schools are located on heavily travelled roads. Of the district's 11 schools, only the two recently constructed elementary schools are in neighborhoods that are secluded from heavy traffic and easily accessible by neighborhood students. The majority of the other district campuses are located on heavily travelled roads or in areas that lack communal infrastructure due to the district formerly being a rural community.

School sites should provide convenient accessibility, support efficient transportation to and from the campus location, and be accessible to community services needed by the school. School sites should also be appropriately located with respect to other schools and the population they will serve.

EXHIBIT 4-16
SURVEY QUESTION: EMERGENCY MAINTENANCE IS HANDLED PROMPTLY.

SURVEY RESPONDENTS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
Principals/Assistant Principals	25%	63%	0%	12%	0%
Teachers	22%	51%	11%	10%	6%
Administrative & Support Staff	20%	43%	27%	8%	2%
Students	6%	42%	23%	20%	9%

SOURCE: MJLM Survey, March 2009.

EXHIBIT 4-17
SURVEY QUESTION: PROCEDURES FOR SUBMITTING WORK ORDERS ARE CLEARLY DEFINED BY THE ENVIRONMENTAL SERVICES DEPARTMENT.

SURVEY RESPONDENTS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
Principals/Assistant Principals	17%	50%	17%	16%	0%

SOURCE: MJLM Survey, March 2009.

School facility experts document school site selection best practices as follows:

- Collaborate with community in school sites selection;

- Select school sites that promote a neighborhood concept;

- Avoid sites that are adjacent to heavily travelled roads and busy intersections; and

- Avoid sites near commercial areas.

MISD should evaluate the process for selecting school sites using additional factors such as student accessibility and the cost of transporting all district students to school. Industry best practices can be used as guidelines for implementing successful site selection. MISD should continue collaboration with community members concerning site selection. This recommendation can be implemented with existing resources.

CAMPUS SPACE UTILIZATION (REC. 25)

MISD has not developed a space utilization plan to optimize existing classroom space (including portables) and to determine the timeframe for continuing its school building

program. Housing communities within MISD are now experiencing slower growth. As a result, the need for new school buildings may not be as significant as during the previous five years. Additionally, the district has a significant number of portable classrooms to accommodate excess student capacity.

Exhibit 4-18 documents the current facilities use rates for MISD. Currently, MISD uses an average of 64 percent of its building space. Also, portable usage accounts for 3 percent of all square footage. As the district's population growth declines or becomes stagnant due to housing communities experiencing slower growth, MISD should be able to accommodate future students with their current facilities. There are only two MISD campuses that are near usage capacity, Bluebonnet Trail Elementary School is at 91 percent capacity and Manor Elementary School is at 98 percent capacity. Manor Elementary School currently does not utilize any portable building space to accommodate students should the campus reach full capacity. If necessary, a possible solution would be to use portable buildings. Bluebonnet Trail Elementary School is near capacity; however, their use of portable buildings may hinder accommodating any growth in the area. MISD provides transportation to all students at all schools; therefore, should Bluebonnet Trail Elementary

EXHIBIT 4-18
MISD SCHOOL FACILITY INVENTORY AND USE RATES

FACILITY	YEAR BUILT	GRADES LEVELS	PERMANENT SFT	PORT. BLDG. SFT	TOTAL SFT	DESIGN CAPACITY	ENROLLMENT	USE RATE
Manor High School	1998	9–12	250,000	1,536	251,536	1,850	1,027	55%
Manor New Tech High School	1965	9–12	52,000	0	52,000	500	225	45%
Excel/MAP	1954	K–12	61,000	10,752	71,752	650	43	6.6%
Manor Middle School	2006	6–8	80,000	9,216	89,216	1200	715	60%
Decker Middle School	2008	6–8	137,000	0	137,000	900	607	67%
Bluebonnet Trail Elementary School	1992	K–5	137,000	6,144	143,144	700	820	91%
Decker Elementary School	1998	K–5	80,000	13,824	93,824	1,150	558	49%
Manor Elementary School	2006	K–5	80,000	0	80,000	700	688	98%
Blake Manor Elementary School	2006	K–5	80,000	0	80,000	700	598	85%
Presidential Meadows Elementary School	2007	K–5	80,000	0	80,000	700	589	84%
Oak Meadows Elementary School	2008	K–5	80,000	0	80,000	700	457	65%
TOTAL			**1,117,000**	**41,472**	**1,158,472**	**9,750**	**6,327**	**64%**

Source: MISD Director of Environmental Services, March 2009.

School reach capacity, some students in the Bluebonnet Trail Elementary school zone could be bused to another area school.

Exhibit 4-19 provides student enrollment projections for MISD for 2009 through 2016 as compared to facility capacities including portables. Six campuses are projected to hit capacity between 2009 and 2016.

The Environmental Services Department should develop a space utilization plan and optimize enrollment at schools, including the use of portables. This plan should consider revising attendance boundaries as an alternate means of continuing its school building program. MISD should consider evaluating boundary changes to relieve future overcrowding or underutilization of schools. Also, changes in boundaries can help alleviate the need for immediate new construction. This recommendation can be implemented with existing resources.

PREVENTIVE MAINTENANCE (REC. 26)

MISD does not have a preventive maintenance program for its facilities. Facilities preventive maintenance has not been an immediate concern due to the newness of MISD's facilities. However, as the buildings age a preventive maintenance program will become a greater concern.

Typical preventive maintenance programs contain the following characteristics:
- list of equipment that requires repair;
- detailed schedule of the cost of repair;

- timeline schedule for completion of projects; and
- inspection and maintenance procedures.

Facilities maintenance best practices show that a widely used strategy to contain maintenance operations costs involves the development and implementation of a preventive maintenance program. Preventive maintenance provides a planned approach designed to avoid equipment breakdowns and prevent small problems from escalating into major ones. **Exhibit 4-20** presents a sample facilities preventive maintenance program.

MISD should develop and implement a preventive maintenance program for the district's facilities. The director of Environmental Services should develop the preventive maintenance program along with a detailed preventive maintenance schedule for all district maintenance projects and prioritize these projects by building. A timeline and budget for performing preventive maintenance projects should also be clearly established.

After developing the preventive maintenance program, the district should adequately fund its preventive maintenance budget to address the scheduled preventive maintenance activities for the targeted facilities. This recommendation can be implemented with existing resources.

EXHIBIT 4-19
MISD ENROLLMENT CAPACITY AND PROJECTED ENROLLMENT BY SCHOOL
2009 THROUGH 2016

	CAPACITY	2009	2010	2011	2012	2013	2014	2015	2016
Blake Manor Elementary	700	552	550	547	549	575	628	709	811
Bluebonnet Trail Elementary	700	828	912	1023	1117	1252	1366	1481	1,587
Decker Elementary	1150	596	633	662	668	703	731	770	817
Manor Elementary	700	688	705	735	748	790	850	917	992
Oak Meadows Elementary	700	452	465	476	462	460	474	491	512
Presidential Meadows Elementary	700	663	717	778	825	909	991	1084	1,192
Decker Middle School	900	596	627	701	788	880	915	963	1,018
Manor Middle School	1200	607	776	843	830	875	917	978	1,065
Manor High School	1,850	715	1,511	1,563	1,802	1,861	1,996	2,162	2,287
Total	**8,600**	**5,697**	**6,896**	**7,328**	**7,789**	**8,305**	**8,868**	**9,555**	**10,281**

NOTE: Bolded campus enrollments indicate the year at which that campus is projected to hit capacity.
SOURCE: MISD's Demographic Study, 2008 Update.

EXHIBIT 4-20
A SAMPLE PREVENTIVE MAINTENANCE PROGRAM FOR FACILITIES

AREA	COMPONENT	INSPECTION AND REPAIR (3–6 MONTH INTERVALS)	INSPECTION AND REPAIR ANNUALLY	INSPECTION AND REPAIR (2–5 YEAR INTERVALS)	INSPECTION AND REPLACEMENT (7–10 YEAR INTERVALS)	INSPECTION AND REPLACEMENT (12–15 YEARS)
Exterior	Roof		✓	✓		✓
	Roof Drainage		✓	✓		
	Windows and Glass		✓	✓	✓	
	Masonry		✓	✓		
	Foundations		✓			✓
	Joints and Sealants		✓		✓	
Equipment	Belts and Filters	✓				
	Motors and Fans	✓		✓		✓
	Pipes and Fittings	✓			✓	
	Ductwork		✓		✓	
	Electrical Controls		✓		✓	
	Heating Equip.	✓			✓	
	Air-conditioning Equipment	✓			✓	
Interior	Doors and Hardware		✓			✓
	Wall Finishes		✓			✓
	Floor Finishes		✓		✓	
Site	Parking and Walks		✓	✓		
	Drainage		✓	✓		
	Landscaping	✓			✓	
	Play Equipment		✓		✓	

SOURCE: Developed by MJLM, March 2009.

WORK ORDER SYSTEM (REC. 27)

The Environmental Services Department does not fully utilize its automated work order system to help prioritize and track its work orders electronically. As a result, work orders have not been used effectively to set accurate targets for completion, measure performance, and establish cost-control strategies.

The district currently uses the ACT 1000 work order system as a log to track work orders and to determine if work orders have been completed.

When reviewing the district's maintenance operations, the following operational issues surfaced during interviews with maintenance staff:

• The Environmental Services secretary manually prioritizes the work orders, using discretion to route work orders to maintenance staff and craftsmen. Work orders prioritized manually allow schools to call in non-emergency work orders as emergency work orders, requiring the craftsman to determine the actual priority level.

• Work orders received via phone are manually documented by the Environmental Services secretary, prioritized, and distributed to the appropriate craftsman prior to being logged into the work order system. This process relegates the work order system to a work order record and does not take advantage of its ability to track, analyze or distribute the work orders as they are received.

• Historically, work orders have not been budgeted; therefore, the true cost of maintenance and resource requirements is not available for planning purposes.

The lack of a fully automated work order system forces staff and users to rely on manual processes that are inefficient, time consuming, and error prone.

MISD should fully implement the work order system to process, prioritize, and analyze work order requests. Full implementation of the district's work order system will allow the following:

• Monitor work order status;

• Prioritize work orders objectively and efficiently;

• Establish targets for work order completion times and track success rates;

• Track direct labor hours and material costs by school, work order, and staff;

• More effectively quantify the amount of travel time between district facilities;

• Provide easy access to historical maintenance records for each school; and

• Schedule and automatically generate timely work for preventive maintenance.

This recommendation can be implemented with existing resources.

MATERIAL STANDARDIZATION (REC. 28)

Material standards have not been developed for regular maintenance items such as plumbing parts, carpet, wall coverings, and light fixtures that are used in standard building renovations. Successful use of building standard materials helps school districts ensure that construction and renovation costs are as low as possible.

During the on-site visit and interviews with maintenance employees, the review team discovered that the district did not consistently use standardized materials for school campuses. Campus administrators are given the discretion to select items such as campus carpet and color scheme. This requires maintenance staff to retain enough materials related to each campus' specific choices to address maintenance issues that require these materials. This makes for tedious inventory management and can increase inventory costs.

Selecting standardized materials district-wide can benefit the district several ways:

• Improved inventory management by having standard materials and reduces the number of different inventoried items;

• Increased volume can reduce purchasing cost providing the district with greater purchasing power when dealing with wholesale suppliers; and

• Increased standardized inventory can help efficiency, by improving the maintenance process. Currently, staff are dispersed to a maintenance issue, the issue is diagnosed, necessary parts are purchased, and staff return to repair the maintenance issue. However, if materials are standardized and inventoried, the maintenance staff can take materials with them to the work site and complete the repair without having to purchase materials.

The district should develop material standards for items such as plumbing parts, carpet, wall coverings and light fixtures that are used in building construction and renovation. The district should perform cost analysis to determine how material standardization can reduce inventory costs. MISD should also perform a comprehensive inventory and analyze how material standardization can benefit the maintenance process. This recommendation can be implemented with existing resources.

COST-BENEFIT ANALYSIS (REC. 29)

MISD does not perform a formal cost-benefit analysis to determine the relative value of in-house operations. As a result, the district cannot quantify the benefits of in-house operations and confirm the relative cost-effectiveness. For example, as recently as spring 2009, the maintenance team re-roofed several portable buildings. The project was led by the Heating Ventilation and Air Conditioning (HVAC) Technician.

Exhibit 4-21 displays examples of services that MISD outsources, the service provider, and the cost to the district.

The district should implement a process to perform regularly scheduled cost-benefit analysis for such operational areas as custodial operations for nightly cleaning, periodic grounds operations, and maintenance operations. To maintain the lowest possible cost of the district's maintenance operations, an annual or semi-annual review of services should be conducted. These ongoing evaluations should be documented and available to the school board and the public for review.

EXHIBIT 4-21
MISD CONTRACTED SERVICE AND SERVICE PROVIDER

SERVICE PROVIDER	DESCRIPTION	AMOUNT
Waste Management	Provide garbage disposal at MISD schools.	$4,066 monthly
Master Burglar	Continuous monitoring of installed burglar alarm systems MISD schools.	$360 annually (approximately)
SOS Liquid Waste	Grease trap disposal for school kitchens.	$3,617 monthly
Indoor Environmental Health Specialist	HVAC filter service, change all MISD air filters every 60 days.	$4,952 per full service $281 per partial service

SOURCE: Data provided by Manor Independent School District, March 2009.

If the service is contracted or outsourced, periodic written follow-up and analyses should be made to confirm the effectiveness of the service and to verify that any anticipated cost savings have actually been achieved. MISD should consider and evaluate the cost to hire, manage, evaluate, and terminate employees. This recommendation can be implemented with existing resources.

STAFF ALLOCATION (REC. 30)

MISD's Environmental Services Department has no formal model in place to determine staffing requirements for facilities-related functions. MISD has a staff of 19 maintenance and craftsmen which the district deploys to perform maintenance projects district-wide. The review team compared maintenance staffing levels to selected peer districts; this comparison revealed that MISD's maintenance staffing levels appear appropriate.

Exhibit 4-22 shows MISD maintenance function staffing comparison to its selected peer districts. Peer districts are school districts similar to Manor ISD that are used for comparison purposes.

MISD has 58 budgeted custodial positions responsible for cleaning about 1.2 million square feet of school floor space. This allocates 19,974 square feet per custodian. In 2002, the Association of Physical Plant Administrators (APPA) published findings to establish custodial staffing guidelines for educational facilities. Based on the guidelines published by APPA, custodians should clean approximately 21,000 square feet per day to establish a school at "Level 2", the APPA standard for "Ordinary Tidiness." A building cleaned

EXHIBIT 4-22
MAINTENANCE FUNCTION STAFFING COMPARISONS FOR MISD AND PEER DISTRICTS
2007–08

VARIABLE	MANOR	MOUNT PLEASANT	SHELDON	WILLIS
2007–08 Enrollment	5,825	5,311	5,774	5,937
Total Number of Schools	11	10	9	8
Management, Supervision and Foreman	1	1	1	2
Administrative and Clerical	1	1	1	1
General Maintenance/Craftsmen	2	3	3	10
Painters	2	1	0	0
Carpenters and Helpers	1	2	0	0
Plumbers	1	1	2	1
HVAC Technicians	1	2	4	3
Locksmith	1	0	0	0
Electricians	2	2	2	3
Grounds	7	6	8	8
Mechanics	1	1	0	0
Energy Management	1	0	0	0
Other	0	1	2	0
Total Facilities-Related Positions	21	21	23	28
Ratio of Maintenance Staff to Schools	2.1	2.1	2.6	3.5

SOURCE: MISD Director of Environmental Services and Peer Survey Completed by Maintenance Directors, April 2009.

at "Level 2" is considered acceptable for classroom and school space.

When compared to industry standards, some MISD campuses exceed the standard while other campuses are less than the standard, reflecting an inconsistency in the application of the allocation standards. As a result, the district is not optimizing the use of its custodial staff.

The district has misallocated custodians for some campuses and buildings, producing inequitable distribution of custodial staff. As seen in **Exhibit 4-23**, Oak Meadows Elementary, Presidential Meadows Elementary, Blake Manor Elementary, Manor Elementary, and Decker Middle School exceed the standard by a single custodian. Manor Middle School exceeds the standard by two custodians. This practice may be reasonable in some cases, but the district should evaluate each campus individually to determine if additional staff are necessary at the respective schools. Also, several MISD campuses are less than the industry standard. Bluebonnet Trail Elementary, Decker Elementary, and Manor High School have two fewer custodians when compared to the industry standard, and the Excel High School campus has one less custodian.

APPA also provides an adjusted guideline for cleaning that assumes that special attention is paid to some custodial tasks and provides an adjusted guideline for more demanding cleaning activities. The adjusted guideline requires each custodian to clean about 16,705 square feet of floor space.

MISD should develop a staffing allocation model for both maintenance and custodial staff to ensure proper labor productivity. MISD should monitor staffing allocations to ensure that district maintenance and custodial expectations are being met. While the district uses a custodial industry standard formula to distribute workloads among custodians, it does not optimize the use of its custodians. The district should reallocate excessive full-time custodial positions to areas where there are deficiencies in positions. Given the construction of a new elementary school, the district could utilize the new facility as an opportunity to begin the reassignment of staff and institute the practice of standardization at all its campuses and administrative sites. This effort could also serve as an opportunity to determine if additional staff are necessary. This recommendation can be implemented with existing resources.

EXHIBIT 4-23
MISD ACTUAL CUSTODIAL STAFF ALLOCATION
COMPARED TO INDUSTRY STANDARD

SCHOOL/FACILITY	TOTAL BUILDING AREA (GROSS SQUARE FEET)	GSF/21,000	CURRENT CUSTODIAL POSITIONS	OVER (UNDER) DISTRICT FORMULA
Blake Manor Elementary	80,000	4	5	1
Bluebonnet Trail Elementary	143,144	7	5	(2)
Decker Elementary	137,000	7	5	(2)
Manor Elementary	80,000	4	5	1
Oak Meadows Elementary	80,000	4	5	1
Presidential Meadows Elementary	80,000	4	5	1
Decker Middle School	93,824	5	6	1
Manor Middle School	89,216	4	6	2
Manor High School	251,536	12	10	(2)
Excel High School	71,751	4	3	(1)
Manor New Tech High School	52,000	3	3	0
Total	**1,158,471**	**58**	**58**	**0**

SOURCE: Data provided by Manor Independent School District, March 2009.

ENERGY MANAGEMENT (REC. 31)

MISD does not have a formal Energy Management Program. The district's energy management practices are limited to membership in the Bluebonnet Electric Cooperative to control monthly energy rates, thermostat control through electronic monitoring, and tracking monthly costs through electronic spreadsheets.

MISD's primary energy management activities are comprised of the lead HVAC technician monitoring electricity costs from month-to-month for individual buildings. The technician monitors the building's current usage and charges to the previous month's usage charges. However, the technician does not analyze electric charges and usage between similar facilities. Additionally, 90 percent of the district's heating and air conditioning is on a direct digital control system. This system controls the hours of operation and temperature standards of HVAC equipment and outdoor lighting.

Exhibit 4-24 displays MISD's energy cost per square foot. Data for monitoring was not documented for 2008, therefore analysis of the energy costs and usage could not be performed.

The Texas State Energy Conservation Office (SECO) provides several programs and resources that MISD can utilize to develop an energy management program and formal policy to promote energy usage awareness throughout the district. SECO's Schools/Local Government Energy Program has helped more than 3,500 schools and other units of local government set up and maintain effective energy-efficiency programs. SECO provides facility preliminary energy assessments, energy management training workshops, technical support in designing new facilities and on-site training for student energy awareness projects.

SECO provides Texas school districts with the Energy Education Curriculum Program at no cost to the school district. The Energy Education Curriculum program promotes energy conservation and efficiency through education. SECO's Energy Education Curriculum Program's goal is to increase Texas teachers' awareness of alternative energy in their communities and to improve their understanding of the nature and extent of energy and its resources, energy conservation and efficiency, the economic and environmental effects of energy use, and alternative energy technologies.

EXHIBIT 4-24
MISD ACTUAL ENERGY COST
2007

SCHOOL/FACILITY	TOTAL BUILDING AREA (GSF)	ANNUAL ENERGY COST*	ENERGY COST PER SQUARE FT. (AVERAGE)
Manor High School	251,536	$283,319	$1.13
Manor New Tech	52,000	$112,682	$2.17
Excel/MAP	71,752	$5,241	$0.07
Manor Middle School	89,216	$260,186	$1.54
Manor Elementary	80,000		
Decker Middle School	137,000	New School	$0.00
Bluebonnet Trail Elementary	143,144	$61, 819	$0.43
Decker Elementary**	93,824	N/A	$0.00
Blake Manor Elementary	80,000	$95,365	$1.19
Presidential Meadow s Elementary	80,000	$33,942	$0.42
Oak Meadows Elementary	80,000	New School	$0.00
TOTAL	**1,158, 472**	**$852,554**	

*Annual Energy Cost total does not take into consideration new schools or Decker Elementary.
**Annual energy costs for Decker Elementary were not available.
SOURCE: MISD's Environmental Services Department, Calendar Year 2007, used due to it being the most complete and recent year with data; analysis conducted by MJLM.

SECO also provides school districts with an Energy Efficiency Partnership Program; this project provides personalized on-site technical assistance to public schools that includes:

- Analysis of utility bills and other building information to determine energy and cost utilization indices of facilities;

- Recommended maintenance procedures and capital energy retrofits;

- Design and monitoring of customized procedures to control the run times of energy-using systems;

- Informal on-site training for building operators and maintenance staff;

- Follow-up visits to assist with the implementation of the recommendations and to determine savings associated with the project;

- Development of an overall Energy Management Policy; and

- Assistance with the development of guidelines for efficiency levels of future equipment purchases.

MISD's Environmental Services Department should develop a formal Energy Management Program.

Reputable energy management experts such as SECO recommend that an effective energy management program should have an effective energy policy statement. SECO provides a sample energy policy statement which states: "Recognizing our responsibility as Trustees of the Manor Independent School district, we believe that every effort should be made to conserve energy and our natural resources. We also believe that this commitment will be beneficial to our students and taxpayers in prudent financial management and the saving of energy. The fulfillment of this policy is the joint responsibility of the trustees, administrators, teachers, students and support personnel. Cooperation shall be experienced on all levels for the success of this policy." This statement clearly establishes that in order to have an effective energy management program the entire school district must be aware and involved.

SECO also recommends best practice elements for an energy management program that include:

- Mission Statement – Defines broad environmental and management objectives. Also, establishes support by senior administrators.

- Energy Consumption Monitoring and Communications – Organizes on-going monitoring and distribution of facility-specific energy bills.

- Energy Savings or Consumption Targets – Documents reasonable achievable savings targets for annual energy consumption/costs.

- Staff Responsibilities and Training – Documents energy related tasks for custodial, maintenance and administrative staff.

- Staff or School Incentives/Recognition – Formal or informal staff recognition for shared energy savings.

- Energy Program Communications – Create internal and external progress reports to provide visibility.

- Building Energy Assessments/Audits – Identifies poorly performing schools and likely opportunities.

- Building Operating Guidelines – Provides guidance for vacation shutdown, temperature control, etc.

- Purchasing and Procurement Guidelines – Establishes efficiency standards for replacement equipment.

- Schedule for Program Planning/Revision – Documents the need for on-going program oversight.

Educating MISD teachers on energy consumption can help the Environmental Services Department implement energy saving techniques and establish an energy conscious campus environment. Also, the establishment of an environmentally conscious campus should help promote the Energy Management Program. This recommendation can be implemented with existing resources.

FISCAL IMPACT

RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
24. Evaluate the process for selecting school sites using additional factors such as student accessibility and the cost of transporting all district students to school.	$0	$0	$0	$0	$0	$0	$0
25. Develop a space utilization plan to balance and optimize enrollment at schools.	$0	$0	$0	$0	$0	$0	$0
26. Develop and implement a preventive maintenance program for the district's facilities.	$0	$0	$0	$0	$0	$0	$0
27. Fully implement the work order system to process, prioritize, and analyze work order requests.	$0	$0	$0	$0	$0	$0	$0
28. Develop material standards for items such as plumbing parts, carpet, wall coverings, and light fixtures that are used in building construction and renovation.	$0	$0	$0	$0	$0	$0	$0
29. Implement a process to perform regularly scheduled cost-benefit analysis for such operational areas as custodial operations for nightly cleaning, periodic grounds operations, and maintenance operations.	$0	$0	$0	$0	$0	$0	$0
30. Develop a staffing allocation model for both maintenance and custodial staff to ensure proper labor productivity.	$0	$0	$0	$0	$0	$0	$0
31. Develop a formal Energy Management Program.	$0	$0	$0	$0	$0	$0	$0
Totals	**$0**	**$0**	**$0**	**$0**	**$0**	**$0**	**$0**

CHAPTER 5

ASSET AND RISK MANAGEMENT

MANOR INDEPENDENT SCHOOL DISTRICT

CHAPTER 5. ASSET AND RISK MANAGEMENT

School districts have the responsibility of preparing children for the world. To accomplish this task, schools receive scarce taxpayer dollars coupled with the high expectation that no child is left behind. Therefore, all school districts have a fiduciary responsibility to account for, maximize, and protect scarce, financial resources provided by the public. School districts accomplish this task through asset and risk management.

Asset and risk management provides school districts with the means to track, manage, and protect liquid as well as illiquid assets. An effective asset and risk management program uses efficient banking structures to manage cash and liquidity; employs a variety of cash management techniques; maximizes investment earnings; ensures the health and well being of district employees; reduces the risk of loss from unforeseen, catastrophic events; and safeguards fixed assets. Asset and risk managers must strike an uneasy balance between these objectives and cost control. For example, while it is important to maximize investment earnings, it is equally important to preserve invested principal. Districts must protect employee health and vitality; however, there must also be a balance between the richness of healthcare benefits and healthcare costs. While it is important to protect against liability claims and property/casualty losses, the need to control costs may require a district to absorb risks by paying higher deductibles. Finally, fixed assets must be tracked, monitored, and safeguarded; however, since it is not practical or cost effective to track every single asset, districts must establish dollar-value thresholds for recording, tracking, and inventorying such assets.

Manor Independent School District's (MISD) chief financial officer is responsible for cash and investment management and the district's risk management program. The chief financial officer presides over the Business Office and supervises a staff of six consisting of two accounts payable staff and four payroll staff. The chief financial officer reports to the deputy superintendent. **Exhibit 5-1** presents MISD's Business Office organization.

School districts must manage cash and investments daily to achieve their instructional goals and objectives. Effective cash and investment management involves establishing and maintaining beneficial banking relationships; making timely cash deposits; accurately forecasting cash requirements to make funds available when needed; and maximizing returns on assets deposited in appropriate, approved, and safe investment vehicles.

The district maintains its operating funds at a local bank while TexPool and Lonestar hold invested funds. Specialized Public Finance, Inc. is the district's bond advisor, and the district obtains its property casualty insurance through Hanover and the Texas Association of School Board's (TASB) Risk Management Fund.

As the investment officer for the district, the chief financial officer must, within 12 months after taking office and every two years thereafter, attend at least 10 hours of investment

EXHIBIT 5-1
MISD BUSINESS OFFICE ORGANIZATION
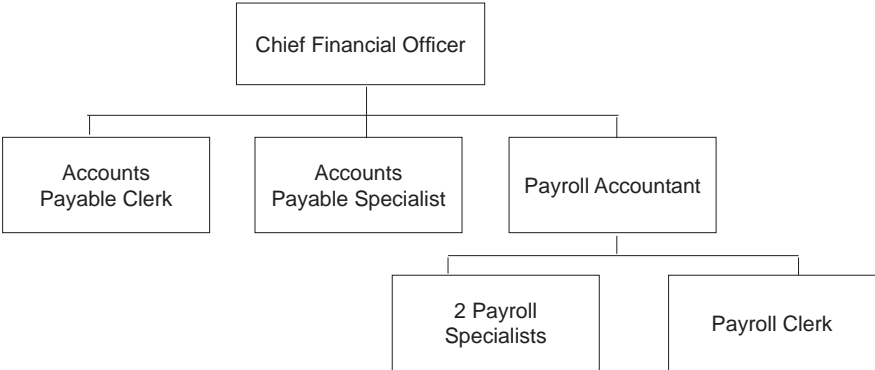
SOURCE: MISD Business Office, March 2009.

training relating to responsibilities under the Public Funds Investment Act (the Act). In compliance with the Act, the chief financial officer completed five hours of training on April 18, 2008, and 5 hours of training on November 24, 2008.

ACCOMPLISHMENTS

- The district hired an inventory consultant to help it achieve greater accountability and control over computer equipment.

- MISD applied for and received a grant from the Texas Association of School Boards to help make safety a priority and reduce workers' compensation claims.

- The district is refinancing some of its bonds to save interest costs.

FINDINGS

- The Business Office does not prepare bank reconciliations on a monthly basis.

- MISD has not maximized the use of cash management techniques such as sweep accounts, payroll imprest accounts, and controlled disbursement to efficiently manage cash and increase interest earnings.

- The district's direct deposit participation rate has not been maximized.

- The Business Office does not maintain a fixed asset subsidiary ledger that can be reconciled to the physical inventory of fixed assets.

RECOMMENDATIONS

- **Recommendation 32: Establish a policy that requires all bank reconciliations to be prepared within 45 days after the end of the month.**

- **Recommendation 33: Expand the use of cash management services to manage cash efficiently and maximize earnings on idle cash balances.**

- **Recommendation 34: Promote the benefits of direct deposit among employees to increase participation in the program.**

- **Recommendation 35: Maintain a detailed list of fixed assets and reconcile it annually to the district's inventory of physical assets.**

DETAILED ACCOMPLISHMENTS

INVENTORY CONSULTANT

The district hired an inventory consultant to help it achieve greater accountability and control over computer equipment. In March 2009, a property inventory consultant completed MISD's first inventory of technology equipment. The company inventoried phones, document cameras, projectors, and computers located throughout the district in all locations except transportation facilities (bus barn and offices) and central office (Curriculum, Food Services, Technology, Student Support Services, Special Education). MISD's technology staff plan to inventory these locations during the summer of 2009. By contracting with a consultant to conduct annual physical inventories of its fixed assets, MISD has lessened the difficulty of a daunting task that many school districts experience: finding, tracking, and recording controllable assets.

MISD will now be using the latest barcode technology to track its computers and related equipment. The consultant placed location barcodes in the door jamb of every classroom and office. Then the consultant affixed a barcode label onto each piece of inventoried equipment in the room. The company is planning to provide the manufacturer of MISD's computers with barcode labels so that the manufacturer can affix them to every computer that MISD purchases. When the computers arrive in the district, MISD's receiving personnel will scan the barcode and upload the equipment into the fixed asset system. This process solves MISD's problem of having to find and tag the computers after they have arrived and been placed in service. It also ensures that every piece of equipment is tagged because it will happen during the manufacturing process.

To ensure that the location of the computers remains updated, MISD plans to conduct an inventory each year using scan guns to scan the location and each piece of equipment. When the information from the scan gun is uploaded to the system, the location of each piece of equipment will be updated.

WORKERS' COMPENSATION CLAIMS

MISD applied for and received a grant from the Texas Association of School Boards (TASB) to help make safety a priority and reduce workers' compensation claims. MISD obtains workers' compensation insurance through TASB's Risk Management Fund, and in 2008, the district applied for and received a $4,000 Loss Prevention Grant from TASB. The district used the grant to purchase hand-held radios for special education classes and step ladders to reduce slips and

falls. Employees use the radios to call for assistance when necessary. MISD also purchased step ladders to reduce slips and falls. Employees use the ladders instead of standing on desks and chairs to reach high objects.

TASB is a voluntary nonprofit association established in 1949 to serve local Texas school districts in a variety of areas including risk management. Since 1998, TASB's Loss Prevention Grant Program has distributed 963 total grants of more than $2.35 million to fund members in the workers' compensation and property/casualty programs. TASB's workers' compensation grants focus on fall prevention, personal lifting devices, personal protective equipment, facilities security initiatives, driver improvement, and vehicle safety.

Between Fiscal Years 2004 and 2008, MISD averaged 100.4 workers' compensation claims per year. During Fiscal Year 2007, MISD incurred 133 workers' compensation claims, the highest in five years. As a result of such high losses, the district began making safety a priority and started implementing safety initiatives such as onsite safety training for employees; participation with Shoes for Crews to reduce injuries due to slips and falls for custodial staff and cafeteria workers; use of burn and cut resistant gloves; and use of slip resistant mats. The district also plans to tailor safety initiatives based upon claims activity. For example, the safety coordinator said that because workers' compensation claims have increased due to slips and falls, the district's goal will be to provide training on slips and falls for all staff, but particularly in the areas where the slips and falls are occurring.

Since implementing some loss prevention procedures, the number of claims fell 33 percent from 133 in Fiscal Year 2007 to 89 claims in Fiscal Year 2008.

BOND REFUNDING

The district is refinancing some of its bonds to save interest costs. On March 9, 2009, MISD's Board of Trustees authorized the issuance of Unlimited Tax Refunding Bonds. The district will refund approximately $7.4 million of Series 1999 bonds. A precipitous drop in interest rates prompted the decision to refinance the bonds. Average interest rates on the bonds have fallen from 4.35 percent to 2.75 percent, thereby making it possible for MISD to save approximately $422,330 over the life of the bond issue. Standard & Poors (S&P) gave the district's refunding bonds a credit rating of A+. S&P is a world renowned provider of independent credit ratings. These ratings are one of several tools that investors use when making decisions about purchasing bonds and other fixed income investments. According to S&P:

> "an obligation rated 'A' is somewhat more susceptible to the adverse effects of changes in circumstances and economic conditions than obligations in higher-rated categories. However, the obligor's capacity to meet its financial commitment on the obligation is still strong. The ratings from 'AA' to 'CCC' may be modified by the addition of a plus (+) or minus (-) sign to show relative standing within the major rating categories."

DETAILED FINDINGS

BANK RECONCILIATIONS (REC. 32)

The Business Office does not prepare bank reconciliations on a monthly basis. The district maintains 21 bank accounts. The Business Office controls nine of these accounts while the schools control 11 student activity accounts. One account is in the name of Partners in Education. The Business Office's nine accounts are comprised of an operating, construction, and interest and sinking fund account, and six investment accounts at Texpool and Lonestar.

An MISD staff member told the review team that bank accounts are not always reconciled each month. Although bank reconciliations were current as of January 2009, the district has not always prepared them timely. One employee told the review team that when they started working for the district in 2006, reconciliations had not been performed in five months. Moreover, in October 2006, the district paid a consultant approximately $6,400 to reconcile 10 months of bank statements in preparation for the Fiscal Year 2008 audit.

During Fiscal Year 2008, MISD made $24.7 and $26.6 million of accounts payable and payroll disbursements, respectively, through its operating account. Thousands of individual deposit and check transactions comprise these amounts, any one of which could have been recorded in the general ledger incorrectly or cleared the bank in error. Without timely, accurate bank reconciliations, MISD cannot know how much cash is available for disbursement or investment. In addition, it cannot know if the amount of cash recorded in the general ledger is correct. The longer it takes to effect a true and accurate reconciliation between the bank statement and the general ledger, the more likely it is that errors or irregularities could occur and go undetected.

Section 5.5.4.5-Monthly Bank Statements of the Texas Education Agency's (TEA) *Financial Accountability System Resource Guide* states, "all bank accounts should be reconciled on a monthly basis by a person who is independent of safeguarding … cash or investments." Performing timely bank reconciliations allows districts to compare their accounting records to the bank's records of transactions and balances to uncover any possible discrepancies. Bank reconciliations are a critical component of internal control because they help ensure the accuracy of recorded cash balances and the identification and correction of bank errors.

MISD should establish a policy that requires all bank reconciliations to be prepared within 45 days after the end of the month. This requirement allows ample time for the district to receive and reconcile the bank statement and resolve any reconciling items. To monitor compliance with the policy, the chief financial officer should create a schedule for each bank account showing the account, month, and date that the bank statement was received; date account reconciled; date reconciling items resolved; and date reconciling items recorded. The district should keep the schedule as evidence that bank accounts are reconciled timely. This recommendation can be implemented with existing resources.

CASH MANAGEMENT SERVICES (REC. 33)

MISD has not maximized the use of cash management techniques such as sweep accounts, payroll imprest accounts, and controlled disbursement to efficiently manage cash and increase interest earnings. Subchapter G, Chapter 45 of the *Texas Education Code* requires every school district in Texas to select a depository or depositories for school funds. The board of trustees has the responsibility for making the selection and executing a new contract effective the first day of the district's new fiscal year. Each school district must select a depository through competitive bidding or through requests for proposals. The depository contracts must be for a period of two years and can be extended for two additional two-year terms. Around January of each odd-numbered year, TEA provides school districts with information for depository contract renewal.

In 2005, MISD issued a bid/RFP for depository services. Subsequently, MISD entered into a contract with Comerica Bank for a two-year period beginning September 1, 2005, and ending August 31, 2007. The first contract extension covered the period September 1, 2007, through August 31, 2009. On March 9, 2009, MISD's Board of Trustees approved a second extension for a two-year period beginning on September 1, 2009, and ending August 31, 2011. At the end of this second two-year period, MISD will be required by law to rebid its depository services contract.

When MISD rebids its depository contract in 2011, it will have an opportunity to expand and enhance the kinds of cash management services it receives from its bank. In accordance with Section 45.206, school districts must use a uniform bid or proposal blank in the form prescribed by State Board of Education rule. Section 45.206(b) states, "the school district may add to the uniform bid or proposal blank other terms that do not unfairly restrict competition between banks in or near the territory of the school district." Other terms added to the bid or proposal by the individual district must be stated in a uniform manner that will permit and facilitate comparison of all bids or proposals.

Although the district has a long-term relationship with its current bank, it is missing an opportunity to streamline cash management operations and improve investment returns since the district does not use a comprehensive suite of cash management services. As a result, cash management is not as efficient as it could be. For example, the district does not use controlled disbursement. Controlled disbursement allows cash managers to transfer just enough cash into the account to cover cash requirements for that day. Each morning, the bank provides the amount of checks clearing the account that day. This service eliminates the guesswork regarding how much cash needs to remain in the accounts to cover clearing checks. As a result, idle cash can remain in investment accounts longer, thereby increasing investment return.

Currently, MISD manually calculates the cash requirement based on the amount of payroll and vendor checks written and ensures that the bank account balance is sufficient to cover these checks. This method exposes the district to the risk of overdrawing an account by mistake. Controlled disbursement is the best insurance against overdrawing accounts.

Today, banks offer a variety of cash management services to help organizations manage their cash more effectively. MISD uses the following cash management services of its depository:

- positive pay;

- online stop payment and viewing check images; and

- monthly CD-ROM for bank reconciliation that contains check images.

Other cash management services that banks offer that the district is not using include the following:

- consolidated account structure with sweep mechanism;

- automated clearinghouse services;

- payroll cards/debit cards/purchasing cards;

- credit card merchant services; and

- payroll zero balance account.

A payroll zero balance account (ZBA) is an example of a benefit that MISD could receive by expanding cash management services. As disbursements are made from a ZBA account, the exact amount necessary to cover the disbursements is automatically transferred to the account. Therefore, the account always has a zero balance. Currently, MISD writes operating and payroll checks, which have a different number sequence, out of the operating account, making the account more difficult to reconcile. Opening a separate zero balance account for payroll would eliminate the problem of dual check number sequences and isolate all payroll-related transactions in one account where deposits will always equal withdrawals. Although creating a payroll ZBA account will increase the number of accounts that will require reconciliation, a separate account will make reconciliations much easier to perform because each account will have only one check sequence and the ZBA account will always have a zero balance.

MISD should expand the use of cash management services to manage cash efficiently and maximize earnings on idle cash balances. The chief financial officer should identify all of the cash management services that the district is not currently using and ensure that these services are included and priced in the 2011 depository contract bid or RFP. The chief financial officer should work closely with the bank to ensure that the district receives value-added services at cost effective rates. Two services that would benefit MISD are sweep accounts and controlled disbursement. These services should be included in the next depository contract.

MISD could receive an estimated $7,062 per year in additional revenue if investable balances from all of its accounts were swept into overnight investments earning interest rates that approximate the TexPool rate. To derive this figure, the interest MISD earned on investable balances for the period December 2007 through December 2008 was compared to the interest the district would have earned had the funds been invested at the same rate offered by TexPool.

Since interest rates have been steadily falling, the review team projected the December 2008 difference (lowest savings increment) over a 12-month period to estimate the additional annual savings. **Exhibit 5-2** shows the calculation for the additional annual savings. This recommendation would result in a savings of $7,062 per year beginning in 2011–12.

DIRECT DEPOSIT PROGRAM (REC. 34)

MISD's direct deposit participation rate has not been maximized. Direct deposit occurs when employees' pay checks are deposited directly into their bank accounts. Currently, 915, or 80 percent, of the district's employees use direct deposit while 222 receive a check. Although MISD's participation rate is high, it could be even higher if the district promoted direct deposit among its employees. **Exhibit 5-3** displays MISD's direct deposit participation rate in comparison to the peer districts. Peer districts are school districts similar to Manor ISD that are used for comparison purposes.

The chief financial officer said that MISD has not promoted direct deposit because many employees prefer to receive and cash their check. The district has arranged with the depository bank to cash MISD employee checks whether or not they maintain an account at the bank. However, as a result of lower participation in its program, MISD and its employees are forfeiting the benefits of direct deposit, which is a "win-win" because it makes payroll processing more efficient for the district and more convenient for the employee. Employers benefit because direct deposit does the following:

- simplifies the account reconciliation process. The account statement shows a single dollar amount for direct deposit transactions instead of individual check amounts, which have to be reconciled;

- simplifies the labor and time processes involved in payroll processing because it requires less manual handling;

- uses the Automated Clearing House (ACH) Network—a safe and secure payment network used by banks, credit unions, and the U.S. government to send and receive payments each day;

- reduces the likelihood of fraud because there is less potential for counterfeit or stolen checks, altered amounts, and forged signatures;

- saves money, as it costs more to process a paper check than a direct deposit transaction; and

EXHIBIT 5-2
ESTIMATED SWEEP SAVINGS
MARCH 2009

MONTH	MANOR ISD BANK INTEREST	SWEEP ESTIMATED SAVINGS	INCREMENTAL SAVINGS
December-07	13,241.47	21,909.93	8,668.46
January-08	8,517.04	11,521.70	3,004.66
February-08	3,467.49	4,923.24	1,455.75
March-08	3,118.38	4,260.99	1,142.61
April-08	2,575.10	3,560.96	985.86
May-08	1,734.87	2,429.03	694.16
June-08	1,628.51	2,268.64	640.13
July-08	1,837.48	2,800.44	962.96
August-08	2,003.82	3,205.31	1,201.49
September-08	3,877.41	5,742.79	1,865.38
October-08	3,390.18	5,066.14	1,675.96
November-08	4,293.56	5,623.10	1,329.54
December-08	1,860.31	2,448.78	588.47
Months in Fiscal Year			12
Estimated Savings			**$7,061.64**

SOURCE: Calculations made from Information provided by MISD Business Office and TexPool Interest Rate History, March 2009. http://www.texpool.com

EXHIBIT 5-3
DIRECT DEPOSIT PARTICIPATION
MISD AND PEER DISTRICTS
MARCH 2009

DISTRICT	EMPLOYEES PAID BY CHECK	EMPLOYEES PAID BY DIRECT DEPOSIT	TOTAL	PERCENTAGE
Willis	171	784	955	82%
Manor	**222**	**915**	**1,137**	**80%**
Mount Pleasant	311	748	1,059	71%
Sheldon	314	708	1,022	69%

SOURCE: MISD Business Office and peer survey conducted by email, March 2009.

- reduces errors because direct deposit requires less manual handling than a check.

Employees benefit in the following ways by having their paychecks directly deposited:

- saves time;

- eliminates trips to the bank;

- promotes convenience, as pay is deposited even while the employee is out of town, on vacation, or sick;

- ensures safety by eliminating lost, stolen, or forged paychecks; and

- eliminates potential for paycheck fraud.

The City of Lubbock Texas cut 30 percent from its payroll costs by using direct deposit, while at the same time giving their 1,920 employees a valuable new benefit. The first year, Lubbock saved $47,073 using direct deposit.

MISD should promote the benefits of direct deposit among employees to increase participation in the program. Direct deposit benefits both the district and the employee. It is more secure than paper checks and eliminates employee trips to the bank or check cashing outlet.

BusinessWeek Magazine published a whitepaper on the keys to a successful direct deposit program. The key point is that employees must be educated about the benefits of direct deposit. Long held fears and distrust of banks can be put to

rest with a comprehensive education and outreach approach. To increase the chances of success, the district should employ the following methods:

- Make sure all information about the program highlights the fact that direct deposit is simple, safe, and smart.

- Hold a staff meeting to explain the benefits of direct deposit, how it works, and to answer questions about the process.

- Post information where employees can see and read about direct deposit.

- Insert information promoting direct deposit with employee paychecks.

- Distribute a memo about the direct deposit program with a list of benefits and FAQs.

- Offer incentives for signing up. Examples include a gift certificate or gift card.

- Hold direct deposit week events during which the focus for the entire week is on signing up for the program.

This recommendation can be implemented with existing resources.

FIXED ASSETS RECONCILIATION (REC. 35)

The Business Office does not maintain a fixed asset subsidiary ledger that can be reconciled to the physical inventory of fixed assets. Not maintaining and reconciling recorded fixed assets to an actual physical inventory could result in inaccurate fixed asset records, which could negatively affect financial reporting. Incorrect property records could also lead to inadequate property insurance coverage if the actual value of the equipment exceeds the coverage. In fact, while renewing the district's 2009–10 property/casualty insurance, the insurance agent expressed concern about the scheduled limits on contractor's equipment, as well as computer, band, and

audio/visual equipment. The agent noted that the "limits have not been adjusted in several years…and need to be reviewed."

MISD's chief financial officer is responsible for recording fixed assets in the district's accounting records and keeps track of fixed asset depreciation. Section 5.4.7 of TEA's *FASRG* states that "capital assets are physical items of equipment or property having an expected life longer than one year; are of a significant value at purchase; and may be reasonably identified and controlled through an inventory system." In addition, *CFB (Local)* defines capital assets as having a value of $5,000 or more. The chief financial officer said that at one time the district tracked all assets with a value of $500 or more. However, upon the advice of its external auditors, the district began tracking only capital assets.

A subsidiary ledger provides a detailed record of specific items that are included in the balance of a general ledger account. A properly prepared fixed assets subsidiary ledger would list each asset individually and contain information such as asset description, asset number, serial number, location, acquisition date, date placed in service, and useful life. The district maintains a summary schedule of fixed asset totals, which consists of totals for buildings, vehicles, and computers, but there is no detailed fixed asset listing. Each year, amounts charged to object code 6600-Capital Outlay - Land, Buildings and Equipment, are added to the appropriate general ledger accounts, which tie to the fixed assets summary schedule. The chief financial officer makes updates to total amounts as property is sold, salvaged, or discarded. However, the district does not maintain or reconcile a detailed list to an actual physical inventory. Moreover, it is not possible to identify a specific parcel of land, piece of equipment, vehicle, or building using the district's summary schedule.

Exhibit 5-4 provides an overview of MISD's depreciable assets as of August 31, 2008.

EXHIBIT 5-4
SUMMARY OF MISD DEPRECIABLE ASSETS
AS OF AUGUST 31, 2008

CATEGORY	TOTAL COST	ACCUMULATED DEPRECIATION	NET
Buildings	$108,637,861	$20,872,796	$87,765,065
Furniture/Equipment	$2,162,028	$882,700	$1,279,328
Vehicles	$3,459,230	$1,787,164	$1,672,066
TOTAL	**$114,259,119**	**$23,542,660**	**$90,716,459**

SOURCE: MISD Business Office Summary of Fixed Asset Totals, March 2009.

Section 5.4.7 of TEA's *FASRG* also states:

> "The purchase of capital assets entails additional procedures to record the item in the capital asset records and identify the asset as school property for security and tracking purposes."

Therefore, it is not enough to simply record amounts in the capital asset records. The district must also physically identify specific assets for security and tracking purposes.

MISD should maintain a detailed list of fixed assets and reconcile it annually to the district's inventory of physical assets. In March 2009, an outside consultant conducted a

physical inventory of phones, document cameras, projectors, and computers. This inventory was the first of its kind in the district. To maximize the benefits of this project, the chief financial officer should use their database as a starting point for a detailed listing of fixed assets and link the recorded accountability for these assets to their physical existence through a reconciliation procedure. Since each asset has a unique identifier in the physical inventory database, it will be necessary for the chief financial officer to use the same identifier on the detailed listing of fixed assets. This recommendation can be implemented with existing resources.

FISCAL IMPACT

RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
32. Establish a policy that requires all bank reconciliations to be prepared within 45 days after the end of the month.	$0	$0	$0	$0	$0	$0	$0
33. Expand the use of cash management services to manage cash efficiently and maximize earnings on idle cash balances.	$0	$0	$7,062	$7,062	$7,062	$21,186	$0
34. Promote the benefits of direct deposit among employees to increase participation in the program.	$0	$0	$0	$0	$0	$0	$0
35. Maintain a detailed list of fixed assets and reconcile it annually to the district's inventory of physical assets.	$0	$0	$0	$0	$0	$0	$0
Totals	**$0**	**$0**	**$7,062**	**$7,062**	**$7,062**	**$21,186**	**$0**

CHAPTER 6

FINANCIAL MANAGEMENT

MANOR INDEPENDENT SCHOOL DISTRICT

CHAPTER 6. FINANCIAL MANAGEMENT

School districts must manage scarce resources effectively and efficiently to accomplish their goals. This effort involves using sound financial practices to leverage available resources while maximizing learning opportunities for students. Sound financial management ensures that school districts receive and manage available revenue; make sound financial decisions and budget allocations; issue timely, accurate, and relevant financial reports; maintain sound internal controls; employ skilled, well-trained staff; and receive favorable audit reports. A school district's financial management operations include payroll, accounts payable, activity funds, budgeting, general accounting, and internal/external auditing.

These functions are critical because goods and services must be acquired, paid for, and recorded if the district is to accomplish its core task of educating children. Vendors and employees expect to be paid on time and for the correct amount. Moreover, a variety of legal requirements must be met, such as compliance with the requirements of TEA's *Financial Accountability System Resource Guide (FASRG)*, internal policies and procedures; Generally Accepted Accounting Principles (GAAP); and Governmental Accounting Standards Board (GASB) guidelines.

Finances play a major role in district activities, touching every aspect of its operations. Sound financial management enables school districts to use cash, employees, land, buildings, equipment, and supplies efficiently to support the educational process and ensures that adequate resources are available for educating the next generation. Therefore, improving the district's finances will significantly influence the success of educational objectives and priorities.

Effective financial management involves the following:
- designing organizational structures and hiring qualified employees to ensure that financial transactions are properly captured, categorized, recorded, and reported;

- developing budgets to monitor spending, control costs, and establish accountability throughout a school district;

- employing manual and automated systems and controls to ensure that vendors and employees are paid accurately and timely and to ensure that

financial transactions are properly recorded on a school district's books; and

- accounting for funds in accordance with applicable laws, rules, and regulations.

Manor Independent School District's (MISD) chief financial officer heads the Business Office and is responsible for financial management of the district. The chief financial officer reports to the deputy superintendent and is involved in every aspect of financial management. The chief financial officer supervises a staff of six.

MISD's total budget for fiscal year 2009 is $72.1 million, including $6.2 million in Special Revenue and $15.6 million for Debt Service. Its adopted General Fund budget for fiscal year 2009 is $49.4 million compared to $41.3 million for fiscal year 2008. Of this amount, 60.7 percent is allocated for instruction. The district's 2009 total tax rate is $1.535 composed of $1.040 maintenance and operations and $0.495 debt service (interest and sinking).

MISD has experienced phenomenal growth in student enrollment. Between fiscal years 2004 and 2009, the district grew an average of 550 students or nearly 20 percent per year. In 2003–04, enrollment was 3,272 students. As of March 6, 2009, enrollment was 6,327 students. Keeping pace with this growth poses a significant challenge for the Business Office. As growth continues, the district must transform itself and transition from a relaxed, informal environment to a more formal, systematic one in which processes and procedures are documented, internal controls replace trust, and financial information is readily available to those who need it.

FINDINGS
- Business Office internal controls are weak and in some cases nonexistent.

- The district is not maximizing the power of its financial accounting software system.

- MISD uses two stand-alone systems that are not integrated with its financial accounting system, making transaction processing more difficult and inefficient while limiting information sharing and reporting.

- The district does not publish a user-friendly budget document.

- MISD does not have sufficient written procedures to guide financial management practices, provide a training and reference tool for current employees, and institutionalize financial knowledge for future employees.

- MISD has not issued a Request for Proposal (RFP) for external audit services since 1997.

- MISD's internal controls over student activity funds are insufficient.

- The district does not provide budget managers—principals, key administrators, and operations managers who are responsible for budget oversight—with sufficient opportunities to participate in the budget process.

RECOMMENDATIONS

- **Recommendation 36: Strengthen Business Office internal controls.**

- **Recommendation 37: Maximize the capabilities of the financial accounting system.**

- **Recommendation 38: Eliminate the use of stand-alone accounting applications and use technology with specifications designed to work with the existing system.**

- **Recommendation 39: Improve the budget document so that it communicates district financial information more clearly and concisely.**

- **Recommendation 40: Document critical financial processes and procedures.**

- **Recommendation 41: Issue a request for proposal (RFP) for auditing services and target an expanded field of qualified auditing firms to respond to the RFP.**

- **Recommendation 42: Strengthen internal controls over student activity funds.**

- **Recommendation 43: Introduce more site-based decision-making concepts into the budget development process.**

DETAILED FINDINGS

INTERNAL CONTROL (REC. 36)

Business Office internal controls are weak and in some cases nonexistent. As a result, the district is exposed to a multitude of risks including unauthorized and inaccurate transactions, misappropriation of funds, and the possibility of fraudulent transactions. In small school districts, segregation of duties is more difficult to achieve because there are fewer employees to perform tasks. In small school districts, employees wear various "hats" and tend to operate in a more informal, personal manner. However, as a district grows, it is important to reexamine its internal control structure to ensure that duties are properly segregated and controls are in place and operating effectively.

MISD continues to operate like a small district despite the fact that it has experienced significant growth. The Business Office has not kept pace with the need for stronger internal controls and greater segregation of duties. Several areas of operation either lack sufficient controls or the controls are so weak that errors and irregularities could occur and go undetected.

First, budgets are important features of internal control because they ensure that limits are placed on spending. MISD's budget controls are weak because goods and services can be requisitioned even when there are no budget funds available to purchase them. Principals, for example, can submit requisitions against line items that have no money. MISD's financial accounting system has the capability to automatically prevent requisitions from being created when there is no budget; however, the feature has been disabled. Instead, the accounts payable clerk manually reviews every requisition to determine if budgeted funds are available. If there are sufficient funds, the requisition is approved; if not, it is returned to the issuer who must prepare a budget transfer. Turning off the budget control feature in the system and replacing it with a manual review leaves room for error and creates a risk that budgets will be overspent.

Second, segregation of duties is a critical component of internal control because it ensures that no one person has complete access to a process or function that would allow them to both perpetuate and cover up improper activities. MISD's segregation of duties is inadequate because Business Office employees have unrestricted access to financial and human resources modules of the Skyward system that extends beyond what is necessary to perform their specific job duties. This unrestricted access creates an environment where fraud,

unauthorized transactions, material errors, breach of confidentiality, and illegitimate access to sensitive information could occur. For example, a Business Office employee told the review team that everyone in the Business Office can see everyone else's pay rate in the payroll system. In fact, the employee said that at one time a dispute arose in the department because an employee, who had viewed another employee's pay rate, was upset that the other employee had a higher pay rate.

The following Business Office duties are not segregated:

- The payroll supervisor has access to human resources modules that allows her to update salary information, including her own.

- Payroll staff have access to human resources modules that allows them to detect and correct errors made by the Human Resources Department as well as change pay rates in the system, including their own.

- Payroll staff can set up a new employee in the system.

- Payroll staff can enter payroll information into the system for the same individuals they are responsible for paying.

- Payroll staff have access to the accounts payable system to process vendor checks resulting from payroll deductions for the cafeteria plan, association memberships, alternative education for teachers going through certification programs, child support, and other deductions. Accounts payable not payroll staff should be processing these payments.

- The accounts payable clerk can access the payroll system to determine the correct account coding for travel and mileage reimbursements for new employees or for employees who have changed positions.

Third, a strong system of internal controls requires physical assets and passwords to be safeguarded. MISD's check stock and electronic signatures are not adequately safeguarded, thereby creating a risk that checks could be issued without proper authorization. MISD keeps check stock in a vault at the district office. However, the sign on the vault reads, "Keep Door Closed, Do Not Lock." The review team observed that not only was the vault door unlocked, it remained open and accessible during the onsite visit. Check stock was kept on a shelf in open cardboard boxes along with other supplies. District checks were accessible to anyone who walked into the vault, including members of the review team.

The lack of controls over check stock is compounded by the lack of controls over electronic signatures. A password is required to print authorizing signatures on checks. Everyone in the business office knows the password. It has not changed in at least 13 months, possibly longer.

Finally, positive pay is an internal control technique designed to prevent unauthorized checks from clearing the bank. Each check run, the district transmits a check file to the bank listing only those checks that the bank is authorized to clear. For the technique to be effective, the positive pay file must be safeguarded and accessible only to authorized persons. However, everyone in the Business Office can log on to the positive pay website. Once on the website, they need a username, pin number, and token code to access the positive pay file. Everyone in the Business Office knows the username and pin number, which never change. The token code is obtained from a key that is kept in the chief financial officer's office in an unlocked desk drawer. The office is not locked. Anyone in the Business Office could obtain the key and gain unauthorized access to the positive pay file.

In 1992, the Committee of Sponsoring Organizations of the Treadway Commission (COSO) issued Internal Control – Integrated Framework (Framework) to help businesses and other entities assess and enhance their internal control systems. Since that time, the Framework has been recognized and used as a best practice by executives, board members, regulators, standard setters, professional organizations, and others as an appropriate, comprehensive method for internal control. The Framework focuses on achieving reliable financial reporting and consists of five components. Each of the five components work together to prevent, detect, or correct material misstatements of financial reports. When the five components are present and functioning, management has reasonable assurance that financial information is reliable and internal control can be deemed effective. The five components of the Framework are as follows:

- risk assessment;

- control activities;

- control environment;

- information and communication; and

- monitoring.

Management implements the Framework first by establishing internal control goals and objectives. Once set, management identifies and assesses a variety of risks to those goals and objectives and determines which risks could result in material

financial reporting errors, unauthorized transactions, or misappropriation of funds. Then management determines how the risks should be managed through a range of control activities. These are approaches designed to capture, process, and communicate control information. All this is done in context of the company's control environment, which is defined as the tone and culture of the organization, which is set at the top and communicated throughout the entire organization. These components must be monitored to help ensure that controls continue to operate properly over time. Determining whether an organization's internal controls are effective involves judgment resulting from an assessment of whether the five components are present and functioning effectively without material weakness.

MISD should strengthen Business Office internal controls. Using the COSO best practice Framework as a baseline for evaluating and improving the existing internal control structure, the approach should be two-pronged. First, obvious weaknesses in internal controls, such as budget line-item control, segregation of duties, and safeguarding of check stock and passwords should be corrected immediately. Specifically, budget authorities should not be allowed to issue requisitions if there is no money in the budget. Access to human resources, payroll, and accounts payable systems should be properly segregated. Payroll personnel should not be able to change pay rates, particularly their own, and should not be given access to the human resources and accounts payable modules. Jobs should be reviewed and system access granted only to the extent necessary to perform the job assigned. Second, as the district continues to grow, the need for strong internal controls will increase. Therefore, MISD's Business Office should adapt the Framework to its circumstances and continually monitor adherence to the five components as the district's internal control environment changes and evolves. This recommendation can be implemented with existing resources.

ACCOUNTING SYSTEM (REC. 37)

The district is not maximizing the power of its financial accounting software system. Certain features designed to promote efficient workflow are not being used. Consequently, Business Office staff perform manual, inefficient workarounds rather than using the power of the system. MISD uses Skyward, a software product developed by a company of the same name that was organized in 1980. The company develops and supports financial, human resources, and administrative software exclusively for K–12 schools.

Skyward offers a business and student management suite of products. The business suite consists of applications such as budget preparation, accounts payable, purchasing, payroll, inventory, fixed assets, time reporting, school based-activity funds, and accounts receivable to name a few. MISD has purchased and uses most of the modules in the business suite, but has not purchased time reporting, school based-activity funds, or fixed assets. Moreover, MISD has not fully maximized the power of modules that it has purchased and uses inefficient manual workarounds.

During fiscal year 2008, MISD's accounts payable clerk processed 2,408 purchase orders and 17,515 invoices. The clerk maintains a file of open purchase orders and invoices, which she holds until evidence of receipt is provided by the requisitioner. This evidence is in the form of copy of the purchase order that has been signed by the individual who received the goods or services. Once the accounts payable clerk receives this document, she performs a manual three-way match of the purchase order, invoice, and receipt then processes the payment. However, the financial system software provides requisitioners with the ability to document receipt within the system; therefore, manually signing a copy of the purchase order and sending it to the accounts payable clerk for the three-way match is an unnecessary manual step. Instead, requisitioners could indicate receipt by simply clicking the receipt button on the financial software receiving screen, as shown in **Exhibit 6-1**.

Another feature of the financial software that MISD does not use involves budget transfers. MISD does not allow principals to make budget transfers. Instead principals must submit budget transfer requests to the chief financial officer for approval even though the financial accounting system allows them to make such transfers. The survey administered to principals and assistant principals by the review team showed that 46 percent of survey respondents would like to be able to make their own budget transfers without having to contact the Business Office. **Exhibit 6-2** presents these survey results.

EXHIBIT 6-1
FINANCIAL SOFTWARE RECEIPT FEATURE
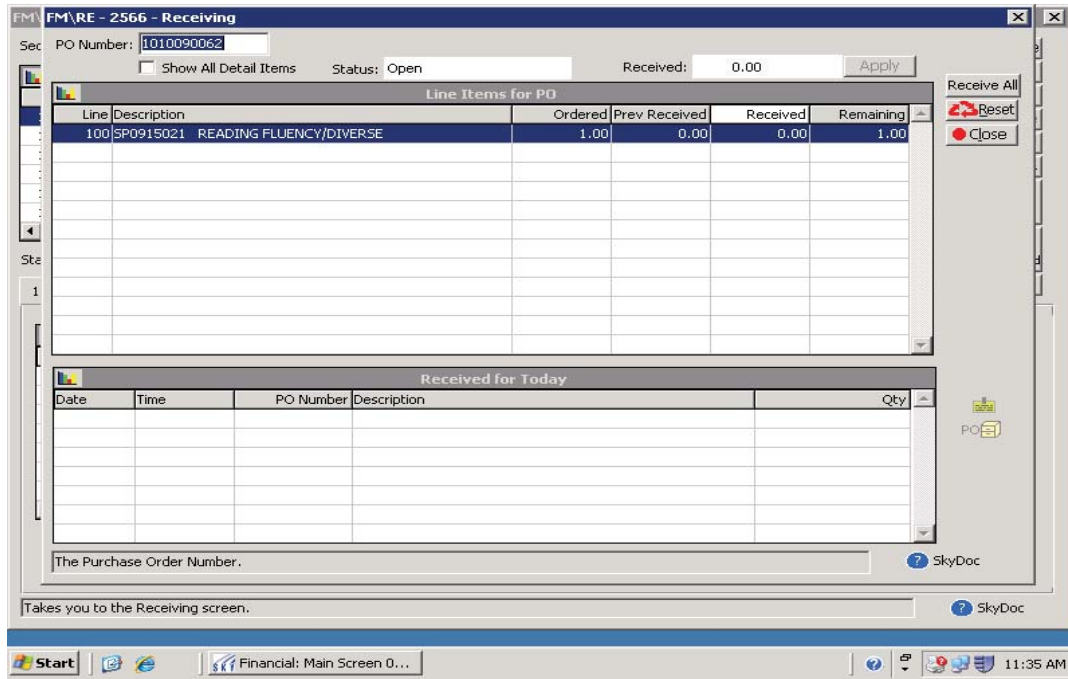
Source: Skyward Accounts Payable Module, March 2009.

EXHIBIT 6-2
PRINCIPAL AND ASSISTANT PRINCIPAL SURVEY RESPONSE – QUESTION #60

SURVEY QUESTION #	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
60. I would like to be able to move funds from one spending category to the other without contacting central office as long as it does not change my overall budget total.	13%	33%	42%	8%	4%

Source: MJLM Survey, March 2009.

Preventing principals and other budget managers from making their own budget transfers within the system introduces an unnecessary bottleneck in the budget transfer process. In fact, Section 5.3.2 of TEA's *Financial Accountability System Resource Guide* entitled, "Site-based Budgeting Roles and Responsibilities" states:

"The principal is responsible for developing and maintaining the campus budget…. Because the budget provides financial resources necessary for the achievement of the campus goals, the principal is responsible for directing these resources to their most effective use."

Once the budget has been adopted, "directing resources to their most effective use" is accomplished through budget amendments and transfers. Budget amendments require board approval because they change the level of the overall budget or require transfers of funds between funds and/or functions. Principals may request but cannot initiate or

authorize budget amendments. However, budget transfers are different. Budget transfers move money within functions and do not require board approval. Therefore, many school districts allow principals and other budget authorities to make budget transfers without district office review or approval. Section 5.3.4 of TEA's *Financial Accountability System Resource Guide* entitled, "Budget Amendments" states:

"At the district level, any amendment that would change budgeted fund or function totals at the district level requires formal board approval. As a result, budget amendments at the campus level must be submitted for board approval when they affect fund or function totals at the district level. Campus budget managers may be granted the authority (at the discretion of the school district board) to move budgeted funds from one expenditure object to another within a function. For example, a principal may transfer budgeted funds from

Supplies and Materials (Object 6300) to Other Operating Costs (Object 6400) within Instruction (Function 11) without formal board approval."

MISD should maximize the capabilities of its financial accounting system. Inefficient, manually intensive processes could be eliminated if the district used the existing features of purchased modules that would enhance processing efficiency. The district has grown accustomed to using manual, inefficient workarounds. As the district grows, the inefficiencies of underutilizing the financial software will become more apparent and increasingly more difficult to resolve. MISD's chief financial officer should review all the capabilities of the financial system software and implement strategies for the district to begin using them. Specifically, MISD should allow requisitioners to indicate receipt of goods and services using the financial software rather than by signing a copy of the purchase order. It should also allow budget managers to make their own budget transfers among object codes within the same function. This recommendation can be implemented with existing resources.

STAND-ALONE TECHNOLOGY (REC. 38)

MISD uses two stand-alone systems that are not integrated with its financial accounting system, making transaction processing more difficult and inefficient while limiting information sharing and reporting. Consequently, MISD is not receiving the benefits of seamless integration that systems with more compatible specifications would provide.

The first stand-alone system is the district's time and attendance system. These systems capture employee time and attendance information and are usually integrated with an organization's payroll system. MISD uses a software product developed by a company known as Systems Design USA (SDI) based in Corpus Christi, Texas. SDI is the vendor that developed and supports MISD's cafeteria point of sale system. MISD purchased the timekeeping module about four years ago, at the encouragement of the food service director, to replace a manual timecard system. The time and attendance software allows employees to clock in and out via terminals or personal computers and produces time reports, an example of which is shown in **Exhibit 6-3**.

MISD's food service director is the only person in the district, including information technology staff, who provides training and support for the time and attendance software. Moreover, until recently, the Food Service director was coordinating efforts between the Skyward financial accounting software and the SDI time and attendance software to integrate time and attendance with the payroll module of the financial system. These efforts had been ongoing for the past two years but have recently been abandoned due to lack of success caused by problems with pay codes, time and a half calculations, overtime hours, and

EXHIBIT 6-3
MISD TIME CARD EXAMPLE

SOURCE: MISD Business Office, Output from SDI Timekeeping System, March 2009.

uploading campus hours. All of these issues can be avoided by using a system with the appropriate specifications that can be integrated with the district's existing payroll application.

The second stand-alone system is campus based. MISD's school secretaries use a popular accounting software package to account for school activity funds. Although the program is user-friendly and provides accurate, timely financial reports, it is a stand-alone program that is not integrated with the district's financial accounting system. As a result, principals cannot view financial information from their computers and must either view information on their secretary's computer or request manual financial reports. Additionally, each year MISD's external auditors review activity fund reports for the year-end audit. Since the accounting system is not integrated with the district's accounting system, each campus must print and send hard copy financial reports to the district office for review by the external auditors. Other features not provided by the separate accounting system include automatic information updates to the general ledger and integrated, centralized processing of vendor records for 1099 processing.

The district stated that the purchase of the two systems was cost efficient at the time, and because MISD has grown at such a fast pace, these two systems have been unable to keep up with the volume and the demand. The district is looking at alternatives and costs to change to compatible modules that would alleviate the problem.

MISD should eliminate the use of stand-alone accounting applications and use technology with specifications designed to work with the existing system. The systems should be fully integrated and accessible across a network rather than as a stand-alone system. For example, the current timekeeping system can only be accessed from a computer on the district's premises. MISD should use a timekeeping system that is compatible with its financial accounting software, compliant with the *Fair Labor Standards Act*, and can be accessed anytime and anywhere that the user has an Internet connection. The system should eliminate the need for manual entry of employee work hours for payroll and eliminate redundant data entry.

The chief financial officer should also seek to replace the student activity accounting system with an integrated system that will allow viewing and sharing of information across the district's network. The program should also be integrated with the district's accounts payable and general ledger system so that double entry of accounting information is eliminated.

The estimated cost to implement a timekeeping system that would be compatible with the district's existing system is approximately $70,000 consisting of $18,000 for software and $52,000 for hardware. The review team obtained these amounts from a vendor that provides integrated timekeeping systems with compatible specifications. The estimated cost of an integrated student activity fund accounting package is $7,100, which was obtained from the same vendor. Therefore, the total fiscal impact of this recommendation would be a one time cost of $77,100.

BUDGET DOCUMENT (REC. 39)

MISD does not publish a user-friendly budget document. Someone unfamiliar with school district accounting and finances cannot readily understand the district's budget. Although published on the district's website, the document is fragmented into six documents consisting of unattractive, system generated printouts that are very difficult to compile, decipher, digest, and comprehend. There are six PDF documents on the district's website consisting of revenues and expenditures for the Local, Debt Service, and Special Revenue Funds. To gain a comprehensive perspective of district revenues and expenditures, the reader would need to open and compile information from the six documents. The budget is a two-year comparison of the original budget by function. However, there is no explanation of what an original budget is or what is included in each function.

Moreover, there is no logical flow or decipherable intent to the information. For example, there is no executive summary, overview, or discussion of budget goals, priorities, or objectives. Also, there are no explanatory narratives, charts, or graphs to highlight important information and numerical relationships. These deficiencies limit the budget's usefulness as a communications device, policy document, or financial plan. In its present form, MISD's budget cannot be used to understand the inner workings of the district. Consequently, MISD is missing an opportunity to enhance its image in the community by demonstrating a commitment to financial accountability, transparency, and stewardship.

Exhibit 6-4 shows the expenditure budget for the local fund. The exhibit illustrates how little the document reveals about the district's operations and spending plans.

A budget document can and should be more than just a financial plan. A budget document has three major purposes: a communications device, a policy document, and a financial plan. In fact, budgets are most useful and effective when used as a means for both the district staff and the community

EXHIBIT 6-4
EXAMPLE OF DISTRICT LOCAL EXPENDITURE BUDGET

3frbud12.p	Manor ISD	Time: 8:53 AM

Date: 10/09/08

03.07.11.00.01-010096   Budget Original By Function Local   (Date: 8/2008)

Page: 1

Comme		DESCRIPTION	Comme	2007–08 Original Budget	2008–09 Original Budget
11		INSTRUCTION		24,919,735.00	30,006,789.00
12		INST. RESOURCES & ME		585,735.00	500,608.00
13		CURRICULUM DEV. & INS		257,186.00	306,717.00
21		INSTRUCTIONAL LEADER		930,427.00	1,161,503.00
23		SCHOOL LEADERSHIP		2,343,529.00	3,30,324.00
31		GUIDANCE & COUNSELIN		919,838.00	1,177,358.00
32		SOCIAL WORK SERVICES		226,122.00	248,637.00
33		HEALTH SERVICES		455,035.00	606,312.00
34		PUPIL TRANSPORTATION		2,652,329.00	2,647,775.00
36		COCURR./EXTRACURR.AC		669,872.00	913,234.00
41		GENERAL ADMINISTRATI		1,628,427.00	1,913,392.00
51		PLANT MAINTENANCE &		4,359,421.00	5,030,533.00
52		SECURITY & MONITORIN		322,000.00	407,000.00
53		DATA PROCESSING SERV		353,381.00	451,035.00
61		COMMUNITY SERVICES		402,750.00	440,111.00
81		FACILITIES ACQ. & CO		200,000.00	200,000.00
95		PYMTS.TO JJAEP PROGR		35,000.00	35,000.00
		GRAND EXPENSE TOTALS		41,260,787.00	49,416,328.00

****************End of Report*******************

SOURCE: MISD Website, Local Expenditure Budget, March 2009.

at-large to understand the inner workings of the district. The district has an opportunity to "tell its story" when the budget communicates what is behind and beyond the numbers.

The Government Finance Officers Association's (GFOA) is a national organization that promotes excellence in the form, content, and presentation of budget documents through budget award programs. The GFOA's program is designed for any governmental entity. These programs establish a number of criteria for exemplary budget documents and provide certification awards to nonprofit entities whose budget documents meet the criteria. Many educational institutions across the country use the criteria to apply for

the award, but some use them merely to improve their budget document's content, format, and presentation.

MISD should improve the budget document so that it communicates district financial information more clearly and concisely. Even if MISD does not choose to apply for GFOA's Distinguished Budget Presentation Award, it could use GFOA criteria and examples from GFOA award winning budgets to improve its budget document. For example, MISD could significantly improve the presentation of its budget by summarizing, on a single page, budgeted revenues and expenditures by fund and function. To illustrate, **Exhibit 6-5** presents the budget summary page from the North East

EXHIBIT 6-5
BEST PRACTICE BUDGET SUMMARY

NORTH EAST INDEPENDENT SCHOOL DISTRICT
2007 - 2008 Adopted Budget
JUNE 18, 2007

	GENERAL FUND	SCHOOL NUTRITION FUND	DEBT SERVICE FUND	TOTAL ALL FUNDS
ESTIMATED REVENUES				
LOCAL	$ 270,887,062	$ 13,084,751	$ 86,975,903	$ 370,947,716
STATE	190,372,939	753,452		191,126,391
FEDERAL & OTHER	1,233,814	11,621,355		12,855,169
OTHER RESOURCES	173,125	-	-	173,125
TOTAL REVENUES	$ 462,666,940	$ 25,459,558	$ 86,975,903	$ 575,102,401
APPROPRIATIONS				
FUNCTION 11 INSTRUCTION	$ 285,975,032			$ 285,975,032
FUNCTION 12 INSTRUCTIONAL RESOURCES & MEDIA SERVICES	7,952,960			7,952,960
FUNCTION 13 CURRICULUM & INSTRUCTIONAL STAFF DEVELOPMENT	9,503,919			9,503,919
FUNCTION 21 INSTRUCTIONAL LEADERSHIP	5,792,512			5,792,512
FUNCTION 23 SCHOOL LEADERSHIP	30,542,034			30,542,034
FUNCTION 31 GUIDANCE & COUNSELING	16,688,741			16,688,741
FUNCTION 32 SOCIAL WORK SERVICES	2,066,777			2,066,777
FUNCTION 33 HEALTH SERVICES	6,956,447			6,956,447
FUNCTION 34 STUDENT TRANSPORTATION	15,144,808			15,144,808
FUNCTION 35 FOOD SERVICES	-	22,857,244		22,857,244
FUNCTION 36 EXTRACURRICULAR ACTIVITIES	8,020,836			8,020,836
FUNCTION 41 GENERAL ADMINISTRATION	15,017,050			15,017,050
FUNCTION 51 PLANT MAINTENANCE AND OPERATIONS	52,670,458	2,591,843		55,262,301
FUNCTION 52 SECURITY AND MONITORING SERVICES	3,546,011	65,000		3,611,011
FUNCTION 53 DATA PROCESSING SERVICES	3,574,883			3,574,883
FUNCTION 61 COMMUNITY SERVICES	274,665			274,665
FUNCTION 71 DEBT SERVICE	-		88,244,589	88,244,589
FUNCTION 81 FACILITIES ACQUISITION & CONSTRUCTION	152,234			152,234
FUNCTION 93 PAYMENTS TO FISCAL AGENT	350,000			350,000
FUNCTION 95 JUVENILE JUSTICE ALTERNATIVE EDUCATION	350,000			350,000
TOTAL APPROPRIATIONS	$ 464,579,367	$ 25,514,087	$ 88,244,589	$ 578,338,043
OTHER USES	30,000	-	-	30,000
TOTAL APPROPRIATIONS & OTHER USES	$ 464,609,367	$ 25,514,087	$ 88,244,589	$ 578,368,043
PROJECTED BEGINNING FUND BALANCE 7/1/07	$ 67,702,615	$ 4,821,109	$ 34,831,289	$ 107,355,013
NET REVENUE/SOURCES OVER (APPROPRIATIONS)(USES)	$ (1,942,427)	$ (54,529)	$ (1,268,686)	$ (3,265,642)
PROJECTED ENDING FUND BALANCE 6/30/08	$ 65,760,188	$ 4,766,580	$ 33,562,603	$ 104,089,371
RESERVED/DESIGNATED FUND BALANCE	(4,249,888)	-	-	(4,249,888)
PROJECTED UNRESERVED/UNDESIGNATED FUND BALANCE 6/30/08	$ 61,510,300	$ 4,766,580	$ 33,562,603	$ 99,839,483

SOURCE: North East Independent School District Fiscal Year 2008 Budget Document, March 2009.

Independent School district, a recipient of the GFOA budget award for the past six years.

MISD should take additional steps to improve its budget document. For example, financial data should be clarified using charts, tables, larger fonts, written analysis, and executive level summaries. These incremental steps could be made gradually over time. This recommendation can be implemented with existing resources.

PROCEDURES MANUAL (REC. 40)

MISD does not have sufficient written procedures to guide financial management practices, provide a training and reference tool for current employees, and institutionalize financial knowledge for future employees. Therefore, the Business Office does too much "hand holding" and answering questions about issues that should be documented and made a part of the district's corporate knowledge base. Documented practices and procedures are essential and will become even more so as the district grows. Written procedures provide management, employees, and auditors with information related to the adequacy of internal controls. The lack of documented procedures increases the risk of errors, misappropriation of assets, and disruption of operations.

MISD provided a copy of its *Administrative Handbook and Business Office Guidelines* as evidence of documented procedures. However, the Guidelines are not comprehensive enough to serve as a procedures manual. MISD's procedures manual contains the following information:
- purchasing guidelines;
- purchase order procedures;
- purchase order reminders;
- travel advance, travel reports, check requests, and monthly mileage information;

- diagram of the account coding structure;
- sample budget coding; and
- purchase order processing chart.

When surveyed, a high percentage of principals and assistant principals indicated that they did not understand the district's financial policies and procedures (29%), had not received adequate training on the district financial system (54%), and did not understand how to use the system (46%). **Exhibit 6-6** displays a summary of these survey responses.

One high school principal reported to the review team that during orientation, he was given sufficient verbal instruction and training but could have benefited more if the material had been documented. For example, for budget orientation, he was given a budget printout but no detailed explanation of the meaning of the budget codes in narrative form. He was told and shown how to use the district's financial accounting system, but after the orientation, there was no written documentation of the system that could be used as a reference. He learned the budget module on his own. As a result, whenever there was a question, he had to call the Business Office.

Although help screens are available within the financial accounting software, there is no user documentation for routine tasks such as creating a requisition or reviewing remaining budget funds. For example, neither the accounts payable clerk nor the principals realized that receipt of goods and services can be performed in the financial accounting system, which would eliminate the practice of signing a copy of the purchase order to indicate receipt. While the informal, personal method of training and orientation worked well when the district was small, as it grows, the need for written procedures will become increasingly more important.

EXHIBIT 6-6
PRINCIPAL AND ASSISTANT PRINCIPAL SURVEY RESULTS – QUESTIONS #57, 58, AND 59

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
57. I fully understand the district's financial management policies and procedures and what is expected of me to monitor and protect the financial resources that have been allocated to my school.	4%	42%	25%	25%	4%
58. I have received adequate training on the Skyward system.	0%	38%	8%	25%	29%
59. I understand how to use the Skyward system for the financial management of my school.	0%	38%	17%	21%	25%

NOTE: Percentages may not add to 100% due to rounding.
SOURCE: MJLM Survey, March 2009.

Recent turnover in the Business Office underscores this fact. Only one individual, the chief financial officer, has been with the district longer than four years. The chief financial officer has been with the district about 13 years. Many long-term Business Office employees left or retired as the district grew. Therefore, much of MISD's institutional business knowledge resides with the chief financial officer.

Written procedures are a best practice because they provide significant benefits to organizational advancement. GMP refers to the Good Manufacturing Practice Regulations promulgated by the US Food and Drug Administration (FDA). Although GMP regulations were written for manufacturers, processors, and packagers of drugs, medical devices, and food, some of the practices, such as the need for written procedures, can apply to school districts.

The GMP Institute was founded in 1977 to help companies comply with FDA's GMP regulations. The institute developed 10 principles to help members operate and control their businesses. Principle number 1 is: "Writing detailed step-by-step procedures that provide a roadmap for controlled and consistent performance." **Exhibit 6-7** presents the elements

EXHIBIT 6-7
GMP BENEFITS OF WRITTEN PROCEDURES

BEST PRACTICE BENEFIT	DESCRIPTION
Standards of performance	Written procedures are important in establishing and enforcing work standards. Where required, written procedures help to ensure that the same job is consistently performed the same way each time.
Instruction	Written procedures help instruct employees and serve as a training guideline.
Reference	It is difficult to remember every step involved in manufacturing a quality product. Written procedures provide a time-saving checklist needed to make sure each step is carefully followed.
Control	Written procedures, when well developed, have important control characteristics. They tell you what to look for when auditing and how to evaluate results for compliance.
Review	Putting your procedures down on paper provides you with the opportunity to see how you can improve your operations and plan for performance improvement.
Documentation	Written procedures are a record of how you do certain operations. They are basic business documents which are critical to success.

SOURCE: Adapted from "The 10 Principles of GMP." GMP Institute website: http://www.gmp1st.com/princip.htm, March 2009.

of this principal and shows the best practice benefits of written procedures.

Written procedures are also beneficial for the training of current and new employees and are a valuable resource in the event an employee leaves the department. Written procedures should include sufficient information to permit an individual, who is unfamiliar with the operation, to perform it. Best practice financial management policies and procedures would, at a minimum, cover the following areas:

• budget development;

• budget monitoring;

• accounts payable;

• payroll;

• revenue, income, and receivables;

• purchasing;

• insurance;

• cash handling;

• activity funds;

• property accounting;

• investments;

• debt;

• travel reimbursements;

• record retention;

• tax collections;

• summary of finance; and

• other critical business processes.

The Business Office should document critical financial processes and procedures. While it may be impractical to write comprehensive, detailed procedures for all processes, a time-phased, concerted effort should be made to document desk-level procedures for the most critical business processes. The chief financial officer should champion this effort because of her extensive knowledge of Business Office operations and because of her position. The chief financial officer should identify critical business processes and assign the work of documenting the processing steps to the appropriate individual in the department. The individuals should document the process while the work is being performed to

ensure that it is accurate and complete. The chief financial officer should also assign a timetable for the project. While it would be difficult for Business Office staff to set aside large blocks of time for this effort, the manual can be developed incrementally over a reasonable time period. This recommendation can be implemented with existing resources.

EXTERNAL AUDITOR (REC. 41)

MISD has not issued a request for proposal (RFP) for external audit services since 1997. The current auditor has been auditing the district since fiscal year 1998. The district's long-standing relationship with its auditors could create a perception in the public's mind that the auditors lack independence, thereby undermining confidence in the district's audited financial information. Auditor independence is important to external auditors, and in today's world, perception is reality. More importantly, by not periodically issuing an RFP for audit services, the district does not know if it is getting the best value for services received.

Texas school districts are required by state and federal law to undergo an annual external audit of their financial statements. The fact that the district has not changed auditors for a long period of time does not violate any law. However, auditing standards require auditors to maintain independence so that their opinions, conclusions, judgments, and recommendations will be viewed as impartial by the public. The auditing profession has engaged in a long-standing debate as to whether auditors should be rotated periodically to ensure their independence. Some argue that a periodic change of auditors brings fresh views and new perspectives. Additionally, a rotation of auditors after a guaranteed maximum engagement period enhances their independence because it removes the auditor's fear of being dismissed during the period. The auditor can be more impartial because the threat of being fired over a dispute with the client is eliminated.

Others contend that a long-term, ongoing relationship with a particular auditor is better because mandatory rotation increases audit costs and reduces audit quality over time. They say that the benefits of audit firm rotation can be achieved through internal rotation of the firm's audit staff. In fact, Section 203 of the *Sarbanes-Oxley Act*, passed by Congress in 2002, requires mandatory rotation of the lead and reviewing audit partners after five consecutive years on an engagement.

TEA's *Financial Accountability System Resource Guide* provides a model RFP designed to provide both a school district and

the auditing firm with the information needed to fully understand and evaluate the audit services to be performed. In addition, the GFOA has published an *Audit Management Handbook* to assist governments in procuring quality audit services. The handbook suggests 24 steps to preparing an RFP that meets the needs of the governmental entity as well as the proposing firm. For example, the handbook suggests the following elements be included in an RFP:

- information on how proposals will be evaluated;
- information on the procedures to be followed in the proposal process; and
- description of the government and its accounting systems and financial reporting structures.

Incorporating the other elements recommended in the handbook could promote broader participation by qualified firms in the bid process.

MISD should issue an RFP for auditing services and target an expanded field of qualified auditing firms to respond to the RFP. The chief financial officer should review the model TEA and GFOA request for proposals and ensure that the district expands its advertising of the RFP. Notices should be placed in the Texas Society of Certified Public Accountants' newsletter and on the district's website. Moreover, the district should use a direct mailing to notify qualified accounting firms of the RFP. This recommendation can be implemented with existing resources.

ACTIVITY FUNDS (REC. 42)

MISD's internal controls over student activity funds are insufficient. There are no written cash-handling procedures, and principals and school secretaries control and account for significant funds with limited to no oversight. Although MISD's external auditors include activity funds in their annual audit, audit procedures are applied on a limited basis and may not be sufficient to detect misappropriation of funds that may have occurred during the year. As a result, mishandling or misappropriation of funds could occur and not be detected in a timely manner.

MISD's campus-based organizations collect and expend money for the benefit of the school and its students. Student organizations collect and disburse money for various student-related activities such as athletics, cheerleaders, band, yearbook, and booster clubs. Student clubs raise and expend these funds under the supervision of school staff. Principals are responsible for these funds and must provide for their proper accounting.

Some Texas school districts account for activity funds centrally whereby all accounting is performed at central office. Schools collect and deposit the funds but must submit purchase requisitions to the district central office to use them. Other school districts use a decentralized model, which allows individual schools, under the oversight and supervision of central office staff, to administer and account for the funds. Regardless of the model used, all school districts are required to safeguard these funds throughout the year and submit accounting transactions to the central office at the end of the fiscal year, so they can be audited by independent auditors.

MISD uses a decentralized model to account for student activity funds. Although principals are primarily responsible, the principal's secretary does the bookkeeping using accounting software. Each school maintains its own bank account, which is separate from the district's bank account and reconciled by the secretary each month. Club sponsors requisition funds using a preprinted requisition form that must be signed by the sponsor and approved by the principal. Student activity funds are substantial. Typically, high schools maintain large balances. However, MISD's elementary schools actively raise funds and have significant account balances. Student activity fund account balances as of February 28, 2009, totaled approximately $241,402.89, as shown in **Exhibit 6-8**.

EXHIBIT 6-8
MISD STUDENT ACTIVITY FUND BALANCES
AS OF FEBRUARY 2009

SCHOOL	AMOUNT
Scholarship Fund	$48,005.39
Decker Elementary School	30,732.82
Manor High School	30,548.87
Decker Middle School	23,257.58
Partners in Education	22,207.55
Oak Meadows Elementary	20,159.61
Bluebonnet Trail Elementary	17,234.68
Manor Elementary School	15,303.55
Presidential Meadow Elementary	8,073.50
Blake Manor Elementary	7,746.04
Manor Middle School	6,824.40
New Tech High School	5,741.20
Community Education	4,421.71
Excel Activity	1,145.99
Total	**$241,402.89**

SOURCE: MISD Business Office, March 2009.

Three traits are present when an individual perpetuates a fraud: need, opportunity, and rationalization. A person with a financial need sees an opportunity to enrich themselves financially and rationalizes that they can get away with it. School activity funds are particularly vulnerable to fraud because they are usually handled by lower paid district employees who may see opportunities where cash is involved. The absence or weakness of internal controls may convince a person that they will escape detection. Fraud opportunities often exist in the following areas:

- ticket sales where there is no pre-numbering or reconciliation;
- untimely collection counts and deposits;
- failure to redeposit change funds;
- no procedures for obtaining change for ticket sellers;
- collection of vending machine revenues; and
- no cash handling or administrative procedures for fundraisers.

An incident that occurred at one of MISD's schools during fiscal year 2008 underscores the need for standardized procedures over fundraisers. A school club sold merchandise with a Christmas theme to raise funds for athletics. The club collected the money, but the vendor did not supply the goods until after Christmas. Moreover, some of the delivered merchandise was damaged. Parents, who bought the merchandise as Christmas gifts, were no longer interested in it and demanded a refund. Although the situation was eventually resolved, the club had a very difficult time identifying who was due a refund because it had kept poor cash collection records.

In another instance, a band director said that he issues receipts for fundraisers not because it is required school policy, but because he had always done so as a matter of personal choice. He did not know if other club sponsors issued receipts.

MISD could strengthen internal controls over student activity funds by implementing the following:

- establishing and documenting clear lines of authority between sponsors, school personnel, and central office personnel;
- writing policies for the establishment of student activity funds;

- writing policies and internal controls for the management of student activity funds; and

- requiring school secretaries to submit their transaction registers and bank statements to the central office for review on a quarterly basis.

MISD's chief financial officer should lead the effort to strengthen controls over student activity funds. Student activity funds require a great degree of oversight and control. Stronger controls over these funds will become even more important as the district grows. Some school districts use a hybrid model to account for student activity funds whereby high school and middle school funds are accounted for centrally while accounting for elementary school funds remains decentralized. In MISD's case, the hybrid model would require modification since elementary schools have significant cash balances. Meanwhile, the chief financial officer should devise a means of providing greater supervision and monitoring of student activity funds. As MISD continues to grow, it may be necessary to transition from a decentralized to a centralized model for student activity fund accounting. This recommendation can be implemented with existing resources.

BUDGET PREPARATION (REC. 43)

The district does not provide budget managers—principals, key administrators, and operations managers who are responsible for budget oversight—with sufficient opportunities to participate in the budget process. As a result, site-based budgeting principles are not practiced, which means that campus-based personnel, who should know best what is needed to ensure student success, are not fully involved in budget decisions. Limiting the involvement of those who are closest to the action could result in misplaced funding priorities that could hamper the district's ability to achieve its educational goals.

MISD's budget development team consists of the superintendent, assistant superintendent, deputy superintendent, chief financial officer, and human resources director. These individuals comprise the superintendent's cabinet. Once the board sets spending priorities, the superintendent's cabinet completes the budget in consultation with the board. The budget process begins in January with student enrollment projections for the coming school year. The district uses a demographic study to support the projections. Next, the district reviews revenue and expenditure estimates based upon current law and funding formulas. The superintendent's cabinet holds meetings to discuss the budget

timeline and process and to review personnel staffing and salary schedules. The district uses the Texas Association of School Board's salary study to benchmark their salary structure against other districts and as a baseline for salary increases.

The board's involvement varies from year to year depending on the goals and initiatives for that year. Some years they are focused and involved while other years they are content to allow the budget to be compiled without much involvement. fiscal year 2009 was a high involvement year for the board because the district's primary initiative was salary increases. The superintendent's cabinet provided the board with various salary increase scenarios and showed their effect on the budget and fund balance. The board's goal has been to keep salaries in line with competing districts in the area. During fiscal year 2009, according to the deputy superintendent, MISD gave employees the largest salary increase in 15 years.

Budget managers include principals, key central office administrators, and operations managers who are responsible for an area of the district's budget, such as a campus or a department. Early in the budget process, budget managers are given the board's budget priorities and asked to submit their top three to five priorities for the upcoming fiscal year in the form of a "needs" list. These priorities must be consistent with the stated board objectives for the year.

In February, the superintendent's cabinet submits preliminary budget estimates to the board. These estimates include appraised property values, enrollment levels, average daily attendance, revenues, and expenditures. Throughout March, the superintendent's cabinet completes campus budgets and staffing allowances. The superintendent's cabinet meets with budget managers if the cabinet has questions about a budget manager's needs requests. Also, the superintendent's cabinet meets to review preliminary budget information and salary increase options.

During the months of April, May, and June, the superintendent's cabinet holds three budget workshops (one each month) with the board. The purpose of these meetings is to refine the budget and pare down the budget managers' "needs" list so that it is consistent with revenue projections and other spending priorities. Travis County provides final appraisal values in July, at which time the final budget is recommended to the board. In August, the district holds public hearings on the budget, makes final amendments, and adopts the final budget and tax rate.

After budget managers submit their "needs" list, their involvement in the budget process is limited unless the superintendent's cabinet has questions about their "needs" list. If the "need" is something about which the superintendent's cabinet requires additional information, they meet with the budget manager. At these meetings, the budget manager might be asked to explain their request, justify the need for it, or discuss funding sources for it. However, if the request is inconsistent with the board's goals or is not in line with the district's spending priorities, it is rejected without the input of the budget manager.

During interviews, a middle school principal said that the budget is basically the same as the previous year. Although the schools submit a "needs" list, he did not feel that he was given an ample opportunity to defend it or justify it. As a result, he felt left out of the budget development process. Another budget manager said he submits what he called a "wish list." However, he felt that there was not sufficient involvement in the process because he was not given an opportunity to justify the items on the list.

When surveyed, 38 percent of principals and assistant principals felt that they were not given ample opportunity to participate in the development of their school's budget and determine how much money they will have to spend. **Exhibit 6-9** presents these survey results.

Site-based decision-making is a best practice among Texas school districts. With respect to site-based decision-making, Section 5.1 of TEA's *FASRG* states:

"The basic premise of site-based decision-making is that the most effective decisions are made by those who will actually implement the decisions. The belief is that

people involved at the campus level have a greater opportunity to identify problems, develop problem resolution and change strategy than people located off-campus. Site-based decision-making concepts also recognize that people at the campus level are more likely to internalize change and to support its implementation if they are involved in the decision-making than if they are not."

Section 5.3.1 of TEA's *FASRG* states with respect to site-based budgeting:

"The extent to which site-based decision-making and planning is utilized in a district's budget process is ultimately determined by the superintendent of the district. While site-based budgeting is not a statutory requirement, it is highly recommended that the superintendent, in collaboration with the school board, utilize site-based budgeting methods in the development of the school district's annual budget."

Site-based decision-making has not been fully used at MISD because of its relatively small size. When surveyed, 28 percent of teachers disagreed that site-based budgeting was used effectively to extend the involvement of teachers and principals. **Exhibit 6-10** displays these survey results.

As the district grows, it should introduce more site-based decision-making concepts into the budget development process. The goal should be to push more responsibility to the campus level by allowing principals and teachers to have greater involvement in the decision-making process. In the short-term, MISD should provide explanations to all budget managers of why their "needs" list was rejected. This practice would close the loop and provide feedback to budget

EXHIBIT 6-9
PRINCIPAL AND ASSISTANT PRINCIPAL SURVEY RESPONSE – QUESTION #56

SURVEY QUESTION	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
56. I am given ample opportunity to participate in the development of my school's budget and to determine how much money my school will have to spend during the year.	4%	38%	21%	25%	13%

NOTE: Percentages may not add to 100% due to rounding.
SOURCE: MJLM Survey, March 2009.

EXHIBIT 6-10
TEACHER SURVEY RESPONSE – QUESTION #62

SURVEY QUESTION	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
62. Site-based budgeting is used effectively to extend the involvement of principals and teachers.	8%	28%	37%	20%	8%

NOTE: Percentages may not add to 100% due to rounding.
SOURCE: MJLM Survey, March 2009.

managers so that they understand why their request was not funded. Otherwise, they might make the same requests year after year and never know why their "needs" are not being funded. It would also allow decision makers to obtain valuable input from those individuals who are closest to the classroom. The deputy superintendent and chief financial officer should devise a means of communicating with every budget manager the reasons their requests were denied. They should also develop a plan for including more principals and campus-based personnel in the budget process particularly as the district grows. This recommendation can be implemented with existing resources.

FISCAL IMPACT

	RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
36.	Strengthen Business Office internal controls.	$0	$0	$0	$0	$0	$0	$0
37.	Maximize the capabilities of the financial accounting system.	$0	$0	$0	$0	$0	$0	$0
38.	Eliminate the use of stand-alone accounting applications and use technology with specifications designed to work with the existing system.	$0	$0	$0	$0	$0	$0	($77,100)
39.	Improve the budget document so that it communicates district financial information more clearly and concisely.	$0	$0	$0	$0	$0	$0	$0
40.	Document critical financial processes and procedures.	$0	$0	$0	$0	$0	$0	$0
41.	Issue a request for proposal for auditing services and target an expanded field of qualified auditing firms to respond to the RFP.	$0	$0	$0	$0	$0	$0	$0
42.	Strengthen internal controls over student activity funds.	$0	$0	$0	$0	$0	$0	$0
43.	Introduce more site-based decision-making concepts into the budget development process.	$0	$0	$0	$0	$0	$0	$0
Totals		**$0**	**$0**	**$0**	**$0**	**$0**	**$0**	**($77,100)**

CHAPTER 7

PURCHASING AND TEXTBOOKS

MANOR INDEPENDENT SCHOOL DISTRICT

CHAPTER 7. PURCHASING AND TEXTBOOKS

Manor Independent School District's (MISD) purchasing function is part of the Business Office and is led by the chief financial officer who reports to the deputy superintendent. The responsibility of reviewing, approving, and printing purchase orders is delegated to an accounts payable clerk. Purchase requisitions from campuses and departments are submitted, processed, and approved online. MISD participates in seven cooperative purchasing programs. The district requires written quotes for any purchases between $10,000 and $25,000 if they are not provided by an existing contract.

The district requires all goods to be delivered directly to the campus or department as they do not operate a central warehouse. Technology and textbooks are received in a former agriculture building for inventory tag control. Excess textbooks are also stored in this facility. Space has been designated for the receipt and storage of textbooks and information technology equipment in the new administration building.

ACCOMPLISHMENTS

- MISD participates in seven different purchasing cooperatives. Participating in cooperatives provides access to a greater variety of goods and services, enables them to obtain better pricing and purchasing terms, and also allows the district to spend fewer labor hours on processing bids or requests for proposals for commonly purchased items.

- Construction bids are prepared by the district's third party construction contractor. By using the expertise of their construction contractor for bid preparation and vendor oversight, MISD is able to acquire construction related goods and services without hiring additional staff, and the construction contractor also monitors vendor performance and provides MISD and the board with regular updates.

- MISD was approved by the Texas Education Agency (TEA) as a fast growth district in 2008–09 and was allocated additional textbooks. The planning and coordination of their student textbook allocation allowed MISD to use their fast growth designation to acquire needed ancillary sets without incurring costs to the district.

FINDINGS

- MISD does not adequately segregate the functions of approving purchase requisitions, entering invoices received, and initiating vendor payments.

- MISD does not have adequate internal controls over their vendor master file.

- The Environmental Services Department does not use the purchase order process for many of their purchases.

- MISD's Business Office has a *Purchases/Check Request Guidelines and Procedures* document that is not comprehensive and does not contain purchasing and bid guidelines.

- MISD does not have a formal contract management process with written policies and procedures for centralized monitoring of contracts and vendor performance.

- MISD is considering establishing a central warehouse but has not conducted a cost/benefit study.

- MISD does not have a full-time textbook custodian dedicated to textbook management.

- Textbook ordering and monitoring has not been consistent and has led to textbooks not being distributed in a timely manner.

- MISD does not maintain complete textbook inventory records or accurately account for district textbooks.

- MISD does not include ancillary materials in its textbook inventory.

- MISD does not maintain adequate records of textbook losses to ensure that all textbooks are accounted for accurately, nor do they charge campuses for lost textbooks.

RECOMMENDATIONS

- **Recommendation 44: Establish appropriate segregation of purchasing duties in the Business Office.**

- **Recommendation 45: Establish adequate internal controls over the information system vendor master file.**

- **Recommendation 46: Negotiate discounts with local vendors and require all purchases to be made with a purchase order.**

- **Recommendation 47: Develop a comprehensive purchasing policies and procedures manual, and provide training to all district staff on purchasing policies, regulations, and procedures.**

- **Recommendation 48: Establish and implement a formal contract management process with written policies and procedures to centrally manage and monitor all contracts within the purchasing function, including vendor performance and maintaining a master contract list.**

- **Recommendation 49: Conduct a cost/benefit study prior to committing to operate a centralized warehouse.**

- **Recommendation 50: Strengthen textbook management by establishing a full-time position for district textbook management.**

- **Recommendation 51: Establish stronger textbook planning and receipt processes by enforcing written policies and ensuring that the policies are consistently followed.**

- **Recommendation 52: Strengthen textbook operations and internal controls over textbook inventory to provide complete and accurate records, including fully implementing the textbook inventory program districtwide.**

- **Recommendation 53: Conduct an inventory of all ancillary materials and include them in the district's inventory.**

- **Recommendation 54: Enforce written policies on collecting lost and damaged textbook fines, including requiring campuses to pay for all lost and damaged textbooks from their campus's activity fund.**

DETAILED ACCOMPLISHMENTS

COOPERATIVE PURCHASING

MISD participates in seven different purchasing cooperatives. The seven purchasing cooperatives are; Regional Education Service Centers (Region 13 and Region 20), Texas Association of School Boards cooperative purchasing (Buy Board), Texas Cooperative Purchasing Network (TCPN), Central Texas Purchasing Alliance (CTPA), State of Texas Co-op, and the State of Texas Department of Information Resources (DIR) store. Campuses and departments are encouraged to compare pricing and make their purchases through the participating purchasing cooperatives. Information and web addresses are provided to all campuses and departments on a regular basis so that they can research products and prices.

Participating in cooperatives assists in streamlining the purchasing function, provides access to a greater variety of goods and services and enables the district to obtain competitive pricing and purchasing terms. Another benefit of participating in these purchasing cooperatives is that they process their bids in accordance with state purchasing requirements which allows the district to spend less labor hours on processing bids or requests for proposals for commonly purchased items.

CONSTRUCTION BIDS AND VENDOR MONITORING

MISD has undergone a series of construction projects over the past five years. Construction bids are prepared by the district's third party construction contractor. By using the expertise of their construction contractor for bid preparation and vendor oversight, the district is able to acquire construction related goods and services without hiring additional staff. MISD places the bid advertisements in the newspapers, opens the bids, assembles a team to conduct the bid analysis, presents the recommended vendors to the board of trustees for approval, and pays the invoices. Once the vendors have been approved, the construction contractor monitors vendor performance, receives and approves vendor invoices, then prepares a cover sheet to submit to MISD along with the invoice for payment. The construction contractor also tracks all the expenses on project worksheets and provides MISD and the board of trustees with regular updates.

TEXTBOOK ALLOCATION USAGE

MISD was approved by TEA as a fast growth district in 2008–09 and was allocated additional textbooks. As a result, they were able to acquire 1,174 textbooks and 52 ancillary

sets. The planning and coordination of their student textbook allocation allowed MISD to use their fast growth designation to acquire the needed ancillary sets without incurring costs to the district.

Texas is one of 22 states with a process for approval and adoption of instructional materials. The Texas Constitution, Article VII, Section 3, requires that the State Board of Education (SBOE) set aside sufficient money to provide free textbooks for children attending the public schools in the state. In accordance with this constitutional requirement and provisions of the Texas Education Code (TEC), each year a portion of the Available School Fund is reserved by the SBOE to purchase instructional materials. Funds to be expended on instructional materials are appropriated by the Texas Legislature. State adopted textbooks are funded by the TEA. Adopted textbooks are allocated to a school district annually based upon grade level and subject area enrollments. The enrollment number used for allocation is the enrollment captured by the Public Education Information Management System (PEIMS) at the prior year's October snapshot. If district needs exceed state allocations, or materials are needed which are not adopted by the state, the materials must be purchased with district funds.

Districts that reflect a 10 percent or more increase in student enrollment through PEIMS for the prior three years can apply to be considered a "fast growth" district. This application must be submitted annually. Once approved, the district is then allowed to requisition textbooks that are higher than its enrollment base.

DETAILED FINDINGS

SEGREGATION OF DUTIES IN PURCHASING (REC. 44)

MISD does not adequately segregate the functions of approving purchase requisitions, entering invoices received, and initiating vendor payments. Segregation of duties is an important internal control intended to prevent or decrease the risk of errors or irregularities, identify problems, and ensure that corrective action is taken. Ideally, no single individual should have control over two or more phases of a transaction.

A Business Office accounts payable clerk is assigned to review and approve purchase requisitions that are received online from campuses and departments. Additionally, the same clerk can change information on the purchase requisitions, add and delete line items, initiate purchase requisitions, approve them, and make payments. She also enters and

approves purchase requisitions for the food services, transportation, payroll, and accounts payable departments. Furthermore, she enters invoices as they are received at the Business Office and initiates the vendor payments.

In 2007–08, MISD processed 2,408 purchase orders totaling $8,883,559 and 1,063 purchase orders for September 1, 2008, through March 9, 2009, totaling $3,455,051.

MISD generates purchase requisitions electronically through the district's online purchasing system. After requisitions have been approved by the department or campus-head and draft purchase requisitions have been created by the system, the Business Office accounts payable clerk reviews and approves all purchase requisitions for correct account coding, appropriate vendor, and ensures that the quote number and vendor account number are included. If there are errors in any of the information, the clerk changes it and sends an email to the initiator explaining what was wrong. Once the corrections have been made, the clerk approves the requisition, creating the purchase order and then prints it and places it in a file pending the vendor invoice. The campus or department also prints the purchase order and provides it to the vendor for fulfillment. Once the goods or services have been received, the campus or department completes a receiving report which is a copy of the purchase order stamped with the received date and initialed by the approver, and forwards it to the Business Office for payment. The accounts payable clerk matches the receiving report to the original purchase order and vendor invoice then processes for payment.

MISD should establish appropriate segregation of purchasing duties in the Business Office. The district should reassign the accounts payable staff roles and responsibilities to ensure that the accounts payable clerk can only approve purchase requisitions and not enter or change purchase requisitions and purchase orders or process invoices. Furthermore, staff in the food services, transportation, payroll, and accounts payable departments should be trained and required to enter their own purchase requisitions online. There would be no additional costs or savings to the district to implement this recommendation, as this is a redistribution of roles and responsibilities among current staff in the Business Office.

VENDOR MASTER FILE (REC. 45)

MISD does not have adequate internal controls over the vendor master file (VMF). Failure to implement adequate controls can result in erroneous and duplicate payments, uncashed checks, unapplied credits, tax reporting errors, and even potential fraud.

Staff in the Business Office have access to set up vendors and change vendor information in addition to issuing payments. The accounts payable clerk that is in charge of approving purchase requisitions also has the access rights to add new vendors, and change vendor name, address, and bank account information. MISD's current vendor listing contains 10,109 vendors of which 7,839 (78 percent) are active. A review of the VMF also identified 510 (5 percent) duplicate vendors.

Best practices for establishing and maintaining VMFs include developing and enforcing policies as to who has access to the VMF, data entry consistency, and limiting use of duplicate vendors. **Exhibit 7-1** compares VMF best practices to MISD established procedures.

Vendor master files are an integral component of accounts payable and purchasing internal controls. Well maintained VMFs help prevent internal control failures, inefficiencies, and inaccurate management reports. The function of adding vendors or changing vendor information such as name, address and bank information should be properly segregated from the function of initiating purchase requests and vendor payments. The chief financial officer should be the only individual with access to add or change vendor information.

MISD should establish adequate internal controls over the information system vendor master file. The district should remove access to create or modify vendors and vendor information from all staff except the chief financial officer. Furthermore, the chief financial officer should not be able to initiate or change any purchase order or payment transactions in the information system. There would be no additional costs or savings to implement this recommendation as this is a redistribution of roles and responsibilities among current staff in the Business Office.

EXHIBIT 7-1
VENDOR MASTER FILE BEST PRACTICES
AS COMPARED TO MISD

BEST PRACTICE	PERFORMED BY MISD
Define Ownership. Make sure the data owner for the vendor master file is clearly identified.	No
Enforce Access Controls. Make sure only authorized individuals have access to VMF and ensure that segregation of duties occurs in that individuals with ability to establish and change VMF records cannot also process invoices and payments.	No
Establish and Enforce Vendor Set Up Procedures. Make sure that procedures are enforced. These should include consistent application of not establishing vendors or making any changes, including address, unless the required Supplier data form and Vendor Maintenance forms are authorized and then filed along with print screens showing the addition or changes.	No
Determine When Multiple Vendor Records Will Be Allowed. Ideally, each vendor would appear in the vendor master file only once. However, in practice, multiple records for the same vendor may be required. Separate records for the same vendor should be used when there are differences in remit-to addresses, discount terms or transactional tax treatments. Work with vendors to consolidate multiple remittance addresses. This saves both organizations time and money.	Yes
Manage One-Time Vendor Accounts Separately. Policies should be established to ensure that vendor master records are not created for limited-use vendors. Establish minimum transaction counts (i.e., five annual transactions) and spend thresholds (i.e., $5,000 annually). Vendors not meeting these thresholds should be processed as one-time vendors.	No
Apply Consistent Naming Conventions. Standards should be developed and implemented. All vendor records should use the same naming convention for spelling the full name, address, and other identifying information.	Yes
Enforce Data Validation. Vendor records should not be created without complete population of critical data elements, such as Federal Identification Numbers.	No
Maintain Systems and Policies on a Regular Basis. Vendor master records should be evaluated regularly with inactive and duplicate vendors purged. On an annual basis, review for inactive accounts, duplicate and incomplete records, file format errors, and accuracy issues.	No
Remove Old/Unused Vendors from the System. Develop and implement procedures identifying the frequency and timing of removing inactive vendors from the VMF.	No

SOURCE: MJLM compiled best practices. MISD provided memo on VMF practices, April 3, 2009.

PURCHASES MADE WITHOUT PURCHASE ORDERS (REC. 46)

The Environmental Services Department does not use the purchase order process for many of their purchases. The department often purchases items at local retailers without a purchase order, quote, or bid. Between September 1, 2008 and March 9, 2009 a total of 488 invoices in the amount of $219,910 were received for supplies purchased without a purchase order. MISD is exposed to violating state purchasing requirements and possibly paying higher prices due to not bidding and negotiating discounts with local suppliers on an annual basis. TEC section 44.031 (a) and (b) states that all 12-month period campus purchases, except contracts for the purchase of produce or vehicle fuel, valued at $50,000 or more in the aggregate, must be competitively bid. Most other MISD purchases are made with a purchase order and through the purchasing cooperatives. **Exhibit 7-2** summarizes MISD invoices paid without a purchase order between September 1, 2008, and March 9, 2009.

Many school districts use catalog bids as a means to provide staff viable solutions to quickly obtain goods while adhering to state purchasing regulations. A catalog bid occurs when the district develops a listing of frequently purchased items such as paper, pens, pencils, and office supplies. It then advertises for suppliers to provide their catalog or listing if they sell those items and identify on the request for proposal sheet what the discount price or percentage would be for the items. Each vendor is then placed on the approved vendor list for staff to use when making purchases.

EXHIBIT 7-2
INVOICES PAID WITHOUT A PURCHASE ORDER
SEPTEMBER 1, 2008 – MARCH 9, 2009

DESCRIPTION	NUMBER OF INVOICES	TOTAL AMOUNT OF INVOICES
Contracted Maintenance	185	$82,831.58
Utilities/Telephone/Cell Phone	428	$1,168,484.44
Contracted Service	29	$6,366.94
Supplies	488	$219,910.02
Travel/Supplies/ Mileage	5	$1,065.24
Insurance	3	$38,440.45
Fees	2	$40.00
Total	1,140	$1,517,138.67

SOURCE: MISD Accounts Payable Listing, March 9, 2009.

MISD should negotiate discounts with local vendors and require all purchases to be made with a purchase order. The district should prepare annual catalog bids for local suppliers and negotiate discount pricing, then provide all campuses and departments with the negotiated discounts by retailer. MISD should also require all purchases to be made by purchase order or procurement card. Recurring expenses such as utilities, contracted services, and contracted maintenance should also be assigned an open purchase order for the year. This practice would encumber the funds and provide monitoring against expected expenses.

Based upon the total of supplies purchased of $219,910, MISD could potentially save between $4,400 (for a 2 percent discount) and $11,000 (for a 5 percent discount) annually. The fiscal impact assumes an annual $4,400 savings.

PURCHASING POLICIES MANUAL (REC. 47)

MISD's Business Office has a *Purchases/Check Request Guidelines and Procedures* document that is not comprehensive and does not contain purchasing and bid guidelines. Without a detailed and comprehensive purchasing procedures manual, MISD employees could unknowingly violate district and state purchasing requirements and also spend more time than necessary when attempting to complete purchase requisitions.

The chief financial officer distributes the *Purchases/Check Request Guidelines and Procedures* document each year. This document contains a purchase order process flow, MISD coding structure, sample budget codes, instructions on both completing the purchase requisition Form O and on the electronic purchase order system, and vendor codes for two of the office supply vendors and the regional education service center. The document also contains brief descriptions on when to use the travel advancement form and travel report, check requests, and monthly mileage forms.

The guidelines in the document do not include spending thresholds that would require request for proposals or bids. It also does not contain processes for purchasing fixed assets, technology, using blanket purchase orders, or resolving vendor disputes.

Section 3.2.1 of TEA's *Financial Accountability System Resource Guide (FASRG)* states that every school district, large and small, should have a written manual describing its purchasing policies and procedures. The manual should be designed to assist campus and department level personnel in the purchasing of supplies and services. Rules and guidelines

for those purchases consistent with relevant statutes, regulations and board policies are a vital part of the manual. **Exhibit 7-3** lists the 13 purchasing manual guidelines identified in the FASRG and identifies if they are included in MISD's procedures manual.

Well written purchasing manuals serve as guidance to district employees on the purchasing process. These manuals should be user friendly and contain enough details so that any authorized employee can understand how to correctly follow district purchasing procedures. They should contain completed examples of all forms used in the purchasing and receiving process. Effective purchasing manuals are a primary tool for promoting a strong internal control environment and helping in training school district personnel in purchasing policy and procedures.

McAllen Independent School District has a well developed purchasing manual that includes board policies and competitive purchasing guidelines. The manual is provided

EXHIBIT 7-3
FASRG'S PURCHASING MANUAL GUIDELINES
COMPARED TO MISD'S PURCHASING PROCEDURES

FASRG GUIDELINES	INCLUDED IN MISD'S PROCEDURES
Purchasing goals and objectives	No
Statutes, regulations and board policies applicable to purchasing	No
Purchasing authority	No
Requisition and purchase order processing	Partial
Competitive procurement requirements and procedures	No
Vendor selection and relations	No
Receiving	Partial
Distribution	No
Disposal of obsolete and surplus property	No
Request for payment vouchers and repair and service of equipment.	No
Bid or proposal form	No
Purchase order form	No
Purchase requisition form	No
Receiving report	No
Vendor performance evaluation form	No
Request for payment voucher	Partial

SOURCE: Texas Education Agency, Financial Accountability System Resource Guide; MISD 2008–2009 Purchases/Check Requests Guidelines and Procedures.

to all campuses and departments and is also available online along with forms and a comprehensive listing, by category, of awarded vendors along with the RFQ or bid number, the bid description, and other information. The manual also includes approved vendors for campus activity fund purchases. The purchasing manual provides step-by-step instructions with process flows and screen shots for processing purchase orders, bid procedures, payments, return of merchandise, capital outlay requests, vendor relations, donations, and deadlines. The Purchasing Department also provides comprehensive training each year to all campuses and departments.

MISD should develop a comprehensive purchasing policies and procedures manual, and provide training to all district staff on purchasing policies, regulations, and procedures. The manual and forms should also be provided online and be updated each year. State laws and local policies should be used for the foundation. The chief financial officer should obtain copies of other districts' purchasing manuals and use the TEA *Purchasing Manual – Model Content Outline* for guidance. At a minimum, MISD's purchasing manual should include:

- board policies;

- competitive purchasing thresholds;

- all forms and completed samples;

- details of all purchasing processes and when each one applies;

- request for prices and bids process and forms;

- instructions for purchasing through approved purchasing cooperatives; and

- a complete approved purchasing cooperative and vendor listing.

The chief financial officer should submit a draft manual to the superintendent for approval by December 2009. Once the manual is approved, the chief financial officer should provide a comprehensive training session to district employees. The manual should be updated annually and training should be provided at the beginning of each school year.

There would be no additional costs or savings to the district to implement this recommendation, as this can be completed with current staff in the Business Office.

CONTRACT MANAGEMENT (REC. 48)

MISD does not have a formal contract management process with written policies and procedures for centralized monitoring of contracts and vendor performance. Potentially, the district risks entering into unfavorable contracting arrangements without a consistent formal contract review policy and processes in place for all contracts.

Each campus or department is responsible for monitoring its own contracts, and a third party vendor manages all major construction contracts. In 2007–08, the chief financial officer spent only about 15 percent of her time overseeing purchasing activities, since she divides her time between managing the district's finances and payroll.

The district does not have a formal performance evaluation process to assess a vendor's contract performance. The chief financial officer contacts the user about vendor performance upon extension, renewal, or re-bidding of a contract from a vendor who is doing business with the district. In addition, the district does not have a written policy requiring legal review of contracts prior to execution.

Within established industry best practices, a properly completed vendor evaluation form provides evidence that contract terms are being monitored, appropriate records are maintained, vendor performance is being evaluated, contracts are managed for close-out, and contract results are evaluated. A district's legal counsel review of contracts ensures that terms serve the best interest of the district.

In addition, the district does not maintain a comprehensive working list of contracts, which makes it difficult to determine the number, nature, and status of contracts within the district. According to PEIMS data, MISD expended $5.2 million on contracted services during 2007–08, of which $1.3 million was for utilities.

MISD's contract process begins with the campus or department preparing the specifications for the needed goods or services. The chief financial officer then reviews the requirements, checks for available funds, and issues a Request for Proposal (RFP). Upon receiving bids, an evaluation committee is assembled. The evaluation committee opens and evaluates the bids then selects a recommended vendor to receive the award. The board of trustees is then provided the recommendation for approval. Once the board of trustees approves the vendor, a contract is executed and provided to the vendor and campus or department.

The district does not maintain contract copies in the Business Office. Instead, each campus and department is provided the contract. When the review team requested a master list, the district was unable to provide a list of all open and closed contracts. The chief financial officer was only able to provide copies of the transportation contract and the annual financial audit contract. These documents do not contain performance measures designed to hold the vendor to a high standard of performance. In a fast-growth district like MISD, continual growth and changes in district operations could potentially place the district at risk of not receiving appropriate services from vendors, paying more for services than agreed on, or operating with expired contracts. Without established accountability for oversight and monitoring of district contracts, the district may be left liable for inferior goods or services and possibly exposed to financial loss.

Section 3.2.2.5 of TEA's *Financial Accountability System Resource Guide (FASRG)* states that a system for the evaluation of vendors and their performance is important to support an effective purchasing function. Factors to consider for inclusion in the evaluation are:

- timeliness of deliveries;

- service availability;

- completeness and accuracy of order; and

- quality of products or services received.

The *FASRG* goes on to state that whenever a problem occurs with a vendor it is important to document the problem, noting the date with an accurate description of the problem. The district should also contact the vendor and keep a record of all phone calls, including the dates and what was discussed. This record of information about vendor performance is very important in the evaluation of the vendor.

Contract management ensures that a vendor fulfills all legal obligations and delivers acceptable and expected service. Effective contracts include measures that establish adequate performance such as task completion dates, vendor payments and penalties, and specific standards about exactly what constitutes adequate performance. Contract management requires a clearly identified scope of work, terms of the contract, performance criteria and measurements, and any special provisions. School districts, such as Cedar Hill ISD, and other governmental entities have established contract management policies and procedures to ensure contracting processes are efficient and effective; to avoid legal, ethical, and conflict of interest problems; to include measurable

performance standards; and to evaluate existing procedure standards.

MISD should establish and implement a formal contract management process with written policies and procedures to centrally manage and monitor all contracts within the purchasing function, including vendor performance and maintaining a master contract list. MISD should also maintain a copy of the bids, evaluations, and recommendations as the Purchasing file copy.

There would be no additional costs or savings to the district to implement this recommendation, as this can be completed with current staff in the Business Office.

WAREHOUSE (REC. 49)

MISD is considering establishing a central warehouse but has not conducted a cost/benefit study. The district risks spending more on supplies than needed if the savings from purchasing supplies in bulk does not cover the cost of running a warehouse. MISD does not have a central warehouse to store commonly used instructional, maintenance, and custodial supplies. Instead they order instructional and office supplies on an as-needed basis and have them delivered directly to the campus or department. Environmental Services purchases needed supplies at local retailers.

Operating a central warehouse can sometimes increase convenience and result in some bulk order savings. However, these benefits need to be weighed against the costs incurred for overhead such as building and energy costs, building security and maintenance, warehouse staffing, delivery equipment and staff, and inventory control. Inventory damage, shrinkage, and obsolescence costs also need to be considered. A simplified warehouse cost model is shown in **Exhibit 7-4.**

In order for MISD to operate a successful central warehouse and have adequate segregation of duties, a minimum of three full-time staff would be needed; one staff to manage incoming and outgoing orders and maintain the inventory information system, including pricing updates; one staff to make deliveries; and one staff to receive vendor deliveries and manage the stock. Additionally, an automated inventory system would need to be acquired and implemented, shelving and stock would need to be purchased, and a delivery vehicle would need to be acquired and maintained.

MISD should conduct a cost/benefit study prior to committing to operate a centralized warehouse. If MISD decides to move forward with operating a central warehouse, they should allocate the warehouse costs in the cost of goods provided to campuses and departments.

EXHIBIT 7-4
WAREHOUSE COST MODEL

COST DESCRIPTION	COST
Warehouse Occupancy (Overhead)	
Cost per square foot – cost to build, modify, or lease the warehouse divided by the number of sq. feet. This amount should be allocated to the storage space by type of good inventoried/sold and/or the space allocated to each department.	
Estimated pest control for the year.	
Estimated utilities for the year (electricity, gas, garbage, information technology infrastructure fees, telephone, etc).	
Total cost of warehouse occupancy	
Delivery Equipment	
The normal life cycle of warehouse delivery trucks is 5 years. The formula for determining equipment cost is: Cost to replace each truck $_____ divided by 5 = $____ time the number of trucks ____ = $_____.	
Estimated fuel, oil, grease, and tires.	
Estimated vehicle repair cost.	
Estimated vehicle insurance cost.	
Estimated motor vehicle license fees.	
Total cost of delivery equipment	
Salary and Fringe Benefits	
Salaries of warehouse staff	
Benefits of warehouse staff	
Total cost of salary and fringe benefits	

EXHIBIT 7-4 (CONTINUED)
WAREHOUSE COST MODEL

COST DESCRIPTION	COST
Inventory Investment	
Inventory can be a hidden cost as money invested in the inventory could be in the bank earning interest. Furthermore, the risk of inventory loss becomes a cost to the district. Calculate the inventory investment cost by multiplying the average dollar value of the inventory by the interest rate. Average month end inventory $_____ times current interest rate _____% = Inventory investment cost.	
There are three ways to assign the risk of maintaining an inventory. A district should choose one.	
1. Replacement cost if the total inventory was lost. (Use the highest inventory value of the year).	
2. The cost of inventory losses during the previous year.	
3. The insurance cost on the average monthly inventory value. Include the insurance deductible cost also.	
Total cost on inventory investment	
Summary of Warehouse Cost	
Warehouse occupancy cost total	
Delivery equipment cost total	
Salaries and fringe benefit total	
Inventory investment cost total	
Total warehouse cost	

SOURCE: Adapted by MJLM from the National Food Service Management Institute.

There would be no additional costs or savings to the district to implement this recommendation, as the cost/benefit study can be completed with current staff in the Business Office.

TEXTBOOK MANAGEMENT (REC. 50)

MISD does not have a full-time position dedicated to textbook management.

Currently textbook management is assigned to the director of Resource Management and Dropout Prevention. In addition to managing the district's Dropout Prevention Program, the director is responsible for textbook inventory management including receiving and placing orders, receiving and distributing textbooks, tracking transfers and surplus textbooks, and conducting a physical inventory. The director is able to allocate approximately 30 percent of her time to textbook management.

MISD's textbook inventories are not complete, nor are they conducted in a consistent and timely manner. Records of textbook allocations and orders placed are not complete.

Responsibility for textbook management has changed six times since August 2004. **Exhibit 7-5** shows the changes in responsibility for textbook management from August 2004 to the present.

The textbook mission statement is "Increase student achievement by delivering the right textbooks to the right schools, at the right time, through management of the district's textbooks in the most effective and efficient manner possible." As a result of not having a full-time textbook manager, the constant reassignment of a textbook custodian role, and the high employee turnover within the district, the mission is not being achieved on a consistent basis.

MISD should strengthen textbook management by establishing a full-time position for district textbook management. Otherwise, the district will continue to be at risk for not having textbooks distributed timely and no accountability over textbooks on hand. The fiscal impact for this position is estimated to be $37,929 per year [$32,418 (salary) + $5,511 (17 percent benefits rate)].

TEXTBOOK AVAILABILITY (REC. 51)

Textbook ordering and monitoring has not been consistent and has led to textbooks not being distributed in a timely manner. Textbook ordering is often not adequately planned ahead which has resulted in textbooks not always being available when needed. Fifty-eight percent of principals, 43 percent of the teachers, and 64 percent of the students that responded to surveys stated that they did not always have textbooks when needed.

EXHIBIT 7-5
TEXTBOOK MANAGEMENT RESPONSIBILITIES
AUGUST 2004 – PRESENT

TIME/ROLE	SUPERVISOR	DISTRICT TEXTBOOK CUSTODIAN	ELEMENTARY DISTRICT TEXTBOOK CUSTODIAN	SECONDARY DISTRICT TEXTBOOK CUSTODIAN
Aug. 2008 – Present	Deputy Superintendent (RW)	Director of Resource Management and Dropout Prevention (LC)	None	None
March 2008 – Aug. 2008	Interim Superintendent (AK)	Executive Director of Instructional Services (LC)	None	None
Oct. 2006 – March 2008	Executive Director of Instructional Services (LC)	Instructional Services Secretary (CB)	None	None
Nov. 2005 – Oct. 2006	Executive Director of Instructional Services (LC)	Instructional Services Secretary (LM)	None	None
July 2005 – Nov. 2005	Deputy Superintendent (AK)	Deputy Superintendent Secretary (LM)	None	None
Aug. 2004 – June 2005	Assistant Superintendent (RW)	None	Decker Elementary Campus Assistant Principal	Manor Middle Campus Assistant Principal

NOTE: Letters in parenthesis are initials of staff member holding the position.
SOURCE: Adapted by MJLM from Organization Charts provided by the MISD District Textbook Custodian.

Decker Middle School (DMS) did not distribute textbooks to students until November 2008 although the campus opened in August 2008. This delay occurred due to a lack of monitoring textbook orders, providing the receiving status, and communications. In total 3,838 textbooks were supplied to DMS through three sources; (1) 1,864 from Decker Elementary School, (2) 583 from the MISD textbook warehouse, and (3) 1,391 textbooks ordered. The textbooks were placed in a storage closet and not distributed, pending receipt of 100 percent of the textbooks ordered. Textbooks were distributed to students once the issue of students not having textbooks surfaced.

Textbooks are a crucial part of educating students. As such, a district has the responsibility to ensure that the planning for timely delivery along with the accountability of textbooks received and issued is a key component of their operations. MISD has written procedures to effectively manage textbook operations. However, they are not online and do not appear to be consistently followed. The situation that occurred at Decker Middle School is an example of how the following textbook procedures did not occur.

MISD's textbook policy on annual ordering, *Annual Order Overview*, states the following: "Instructions for requisitioning state-owned textbooks will be sent to the schools from the Textbook Department….. Textbooks are received by MISD Textbook Department between June and August, and are immediately scheduled for delivery to the schools. Each school is responsible for verifying the accuracy of the shipments received. Schools must notify the Textbook Department within 10 days of the delivery for shipment discrepancies." The textbook policies also contain forms to acknowledge campus receipt of textbooks. The policy on receiving textbooks at campuses states that when textbooks arrive at the campus the campus textbook custodian will:

1. Count books.

2. Verify shipment records.

3. Send confirmation to district textbook coordinator.

4. If there is a discrepancy, contact district coordinator immediately and follow instructions.

5. Add books to campus inventory form.

6. File the *Campus Textbook Delivery Form* in the appropriate section.

Each department in the district has an alignment plan to district goals. The Textbook Department has aligned their mission and focus to District Goal 7. Their departmental focus A for this goal is to develop a web version of the MISD Textbook Procedural Manual for better access to procedures and forms for managing textbooks. The alignment plan contains detailed action steps and dashboard indicators. It does not contain a timeline.

MISD should establish stronger textbook planning and receipt processes by enforcing written policies and ensuring that the policies are consistently followed. The Textbook Department should also establish an aggressive timeline to complete their departmental focus for District Goal 7 by January 2010 as it would facilitate stronger textbook operations.

There would be no additional costs or savings to the district to implement this recommendation, as this can be completed by the district textbook custodian.

TEXTBOOKS INVENTORY (REC. 52)

MISD purchased a software program to assist in textbook management, but it is not fully implemented and is not used to maintain complete textbook ordering and inventory records or accurately account for district textbooks. Without an effective textbook inventory process, the district may not have the textbooks that it needs for education and may spend unnecessary resources for additional and replacement textbooks.

The textbook management system is used only to produce barcodes for the textbooks. According to the district textbook custodian, the system can't be fully implemented until the district resolves the issue of having multiple course numbers for the same class and subject. For example, grade 2 math has 10 different course numbers. MISD has targeted summer 2009 to have unique course numbers identified.

Currently, campuses complete a paper textbook requisition form and then email or send the form to the district textbook custodian (DTC). All requisitions are required to have the number of students in the class and the number of textbooks being ordered in addition to the textbook title. The DTC determines if the textbooks are available at another campus or in the warehouse. All of these functions would be available electronically through the textbook management software if it was fully implemented. If the textbooks are not available within the district, the DTC places an order for requested textbooks through an online system known as EMAT (Educational Materials and Textbooks) Online and tracks this order through a spreadsheet. Because textbook ordering is a manual process, there are no electronic records of how many textbooks each campus and classroom should have on hand.

The MISD textbook inventory control overview policy states "The Principal is ultimately responsible for all textbooks assigned to his or her campus. An individual may be designated by the Principal to serve as the campus textbook coordinator. The principal is responsible for distributing textbooks at the beginning of each semester and for preparing the annual inventory." The policy also states "The campus textbook coordinator is responsible for making at least two book counts during a campus year."

MISD does not follow these policies. Instead, MISD hired high school students and a paraprofessional to conduct the textbook inventory at all campuses in the summer of 2007. Campuses were provided charts for the summer 2008 inventory and asked to conduct a self-inventory. However, the inventory process for both summers was not consistent and not all campuses took a full inventory. For example, ancillary sets are not included and teacher editions were not included at the secondary level. Furthermore, the results are on paper and have not been compared to the previous inventory or additional textbooks received.

An effective textbook operation includes an inventory process to maintain and account for all textbooks and procedures to place accountability at the appropriate level.

The review team attempted to examine the textbook records. However, inventory records are not compiled electronically and the textbook order logs are missing many data elements. Consequently, the review team was not able to compile a textbook inventory and MISD's inventory does not reflect all textbooks on hand, nor does it include all transactions that have occurred.

MISD should strengthen textbook operations and internal controls over textbook inventory to provide complete and accurate records, including fully implementing the textbook inventory program districtwide. Adequate internal controls and procedures should be established and implemented to ensure complete and accurate recording of all textbook transactions. Otherwise, the district is exposed to the continued risk of incurring unnecessary textbook purchases due to incomplete or inaccurate records. Furthermore, the district should provide adequate documentation of all textbook activity—in total, by campus and by title, through the inventory system. MISD should implement the following steps to strengthen textbook operations and inventory management:

- Resolve the course ID issue by establishing a unique ID for each course. (MISD targeted completion date is summer 2009).

- Conduct a 100 percent inventory of all textbooks, teacher editions, and ancillary materials.

- Require the textbook coordinator to enter textbook balances and transactions in the textbook system; reconcile the activity to ensure that inventory balances are accurate and complete; and record all textbook transactions in the system.

- Require the deputy superintendent to review and approve the inventory reconciliation and quarterly review reports for reasonableness.

- Implement the campus module of the textbook inventory system at each campus and coordinate necessary training. This step will enable each campus to enter textbook transactions directly into the inventory system, thereby reducing paperwork and providing a systematic reporting process, including lost textbook reports.

- Provide textbook inventory reports, including lost or damaged textbook reports, to appropriate levels of management for review and approval.

- Hold principals accountable for their textbook inventory, enforcing existing procedures and adding a requirement for campuses to pay for all lost/damaged textbooks.

MISD should also implement the campus modules by October 2009. There is no cost to implement this recommendation, as the district has the software and equipment at campuses.

ANCILLARY MATERIALS (REC. 53)

MISD does not include ancillary materials in its textbook inventory. As a result, the materials tend to disappear and teachers do not have the additional teaching resources.

Ancillary materials are additional teaching aides that can be used to enhance the student's learning experience for a particular class. Ancillary materials are generally categorized into three areas: instructional resources, testing resources, and student resources. Each of these resources contain overhead transparencies, printed materials, CD-ROM media, and web-based media. Textbook providers will generally provide one free ancillary set for each new textbook adoption. According to the district textbook custodian, additional or replacement ancillary sets can cost an average of $3,500 each. The Textbook Department alignment plan to district goals noted that losses in ancillaries and *On Your Way to English* were more than $200,000.

When ancillary sets are not included in a district's inventory, teachers and principals may not feel the responsibility of making sure ancillary sets are secured and accounted for. As such, these materials have a tendency to disappear through time and as staff move. According to the district textbook custodian, 26 percent of the textbook requests received between October 24, 2007 and October 31, 2007 were for ancillary materials. Thirty-eight percent of principals and assistant principals, and 32 percent of the teachers that responded to surveys, stated that they did not have enough ancillary materials.

The district was able to acquire 73 ancillary sets in 2008–09 through effective planning and usage of their fast growth designation.

Each department in the district has an alignment plan to district goals. The Textbook Department has aligned their mission and focus to District Goal 7. Their departmental focus C for this goal is to develop a system for inventorying elementary ancillaries and *On Your Way to English* to prevent losses previously experienced. The alignment plan contains detailed action steps and dashboard indicators. It does not contain a timeline.

MISD should conduct an inventory of all ancillary materials and include them in the district's inventory. The district should establish an aggressive timeline to complete their departmental focus for District Goal 7 departmental focus C by December 2009 as it would decrease the amount of money that MISD pays from local funds to replace lost teaching materials. The district should also make all teachers sign an acknowledgement and financial responsibility form for their ancillary materials each year. If ancillary materials are not returned at the end of the school year, the teacher should be charged the replacement cost for any missing materials.

Based upon replacing 10 ancillary sets each year, the savings from counting ancillary materials and including them in the annual inventory along with holding teachers financially responsible could be $35,000 a year ($3,500 per set x 10 sets).

LOST TEXTBOOKS (REC. 54)

MISD does not maintain adequate records of textbook losses to ensure that all textbooks are accounted for accurately, nor do they charge campuses for lost textbooks. As a result, MISD's General Fund allocated $279,516 in 2006 to replace and supplement textbooks.

Teachers at each campus are responsible for tracking textbook damages and losses then completing damaged/lost textbook

notices to provide to parents. Teachers are also responsible for reporting this information to the campus textbook coordinator. The coordinator is then responsible for informing the Business Office.

MISD pays for unaccounted textbooks from local funds rather than requiring the campuses to collect and submit fees for lost and damaged textbooks. MISD allocated $127,745 in 2006 to replace lost textbooks and an additional $152,771 to purchase supplemental textbooks. It is anticipated that the remaining $122,459 will be used to complete the textbook replacements this year. According to the district textbook custodian the decision was made to make a one-time allocation towards textbook replacement and supplement costs to the district instead of charging schools due to the fact that the district losses had not been reported on an annual basis and there had been a large turnover in school administration.

According to the district's textbook procedures, campus textbook coordinators are responsible for checking textbooks twice per year and verifying textbook transactions and reporting discrepancies. The district's procedures also have requirements for principals to be held responsible for all lost/ damaged textbooks. However, the district does not enforce the policies nor does it require campuses to pay for lost/ damaged textbooks.

The textbook inventory program has a campus module for individual campuses with features to maintain inventory for each campus, track lost/missing textbooks, generate activity reports, and integrate with the warehouse module, which automatically updates the consolidated perpetual inventory records.

Each department in the district has an alignment plan to district goals. The Textbook Department has aligned their mission and focus to District Goal 7. Their departmental focus B for this goal is to develop a process for holding campuses financially accountable for textbook losses. The alignment plan contains detailed action steps and dashboard indicators. It does not contain a timeline.

To eliminate the burden on the district's general fund, some districts such as Clear Creek ISD established procedures to require the campuses to pay for textbook shortages from their campus activity fund, which are campus funds outside of the district's general fund.

MISD should enforce written policies on collecting lost and damaged textbook fines, including requiring campuses to pay for all lost and damaged textbooks from their campus's activity fund. The district should also establish an aggressive timeline to complete their departmental focus for District Goal 7 departmental focus B by December 2009 as it would decrease the amount of money that MISD pays from local funds to replace lost textbooks. Textbook replacement costs in 2008–09 were approximately $22,000. The district could realize a savings of approximately this amount each year that could be reallocated for other use.

FISCAL IMPACT

RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
44. Establish appropriate segregation of purchasing duties in the Business Office.	$0	$0	$0	$0	$0	$0	$0
45. Establish adequate internal controls over the information system vendor master file.	$0	$0	$0	$0	$0	$0	$0
46. Negotiate discounts with local vendors and require all purchases to be made with a purchase order.	$4,400	$4,400	$4,400	$4,400	$4,400	$22,000	$0
47. Develop a comprehensive purchasing policies and procedures manual, and provide training to all district staff on purchasing policies, regulations, and procedures.	$0	$0	$0	$0	$0	$0	$0

FISCAL IMPACT (CONTINUED)

RECOMMENDATION		2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
48.	Establish and implement a formal contract management process with written policies and procedures to centrally manage and monitor all contracts within the purchasing function, including vendor performance and maintaining a master contract list.	$0	$0	$0	$0	$0	$0	$0
49.	Conduct a cost/benefit study prior to committing to operate a centralized warehouse.	$0	$0	$0	$0	$0	$0	$0
50.	Strengthen textbook management by establishing a full-time position for district textbook management.	($37,929)	($37,929)	($37,929)	($37,929)	($37,929)	($189,645)	$0
51.	Establish stronger textbook planning and receipt processes by enforcing written policies and ensuring that the policies are consistently followed.	$0	$0	$0	$0	$0	$0	$0
52.	Strengthen textbook operations and internal controls over textbook inventory to provide complete and accurate records, including fully implementing the textbook inventory program districtwide.	$0	$0	$0	$0	$0	$0	$0
53.	Conduct an inventory of all ancillary materials and include them in the district's inventory.	$35,000	$35,000	$35,000	$35,000	$35,000	$175,000	$0
54.	Enforce written policies on collecting lost and damaged textbook fines, including requiring campuses to pay for all lost and damaged textbooks from their campus's activity fund.	$22,000	$22,000	$22,000	$22,000	$22,000	$110,000	$0
Totals		**$23,471**	**$23,471**	**$23,471**	**$23,471**	**$23,471**	**$117,355**	**$0**

CHAPTER 8

FOOD SERVICE

MANOR INDEPENDENT SCHOOL DISTRICT

CHAPTER 8. FOOD SERVICE

Effective food service operations provide students and staff appealing and nutritious breakfasts and lunches at a reasonable cost in an environment that is safe, clean, and accessible. These operations must comply with federal and state regulations and local board policy. The United States Congress directed the National School Lunch Program (NSLP) in 1946 to "safeguard the health and well-being of the nation's children and to encourage the domestic consumption of nutritional agricultural products." The United States Department of Agriculture administers the National School Lunch Program (NSLP) and School Breakfast Program (SBP). These are federally assisted meal programs operating in public and nonprofit private schools and residential child care institutions.

Districts that participate in the NLSP and SBP must serve students meals that meet federal guidelines for nutritional value and offer free or reduced-price meals to eligible students. When districts participate in the NSLP and SBP, they receive cash subsidies and donated commodities from the United States Department of Agriculture (USDA) for each eligible meal served at schools.

MISD's Food Service mission statement is to provide balanced, nutritious meals which support cognitive development in children, and thus lay the foundation for student achievement and success. Their motto is "provide the best meal at the best price." MISD's Food Service director has centralized control of all Food Service functions, including meal reimbursement claims, human resources, purchasing, and cafeteria operations.

There are a total of 77 employees in Food Service. The functions of central Food Service operations are split between the director, warehouse foreman, director's secretary, and secretary/receptionist. MISD Food Service is managed by the Food Service director who reports to the deputy superintendent. The director manages overall Food Service operations, plans school menus, and manages the USDA commodity ordering and usage. The director's secretary is responsible for entering school menus into the Nutrikids system, preparing and filing meal claims to TEA, processing student eligibility applications for free and reduced-price meals, and the time clock system management and training. The secretary is responsible for greeting parents, processing accounts payable, Spanish translations, and assisting with processing student eligibility applications for free and reduced-price meals.

A warehouse foreman monitors weekly commodity deliveries that arrive at Excel High School. He then delivers the commodities to campus cafeterias. The warehouse foreman monitors each campus' inventory by visually looking at items on shelves and in coolers and comparing it to his manual delivery records. Each school Food Service manager manages employees at their school cafeteria, processes weekly purchase orders, and reports to the Food Service director. Employees are staffed at schools according to target meals per labor hour (MPLH).

All 11 MISD schools have fully operational cafeterias and operate as closed campuses, meaning that students are not allowed off school property once classes begin for the day. Staff prepare all food that is served for breakfast and lunch. Students enter serving lines and select what items they would like on their tray, including milk or juice from the beverage coolers. Students either enter their student identification number on a keypad or tell the cashier their student identification number. Food Service implemented a System Design Point-of-Sale (POS) system at each school to account for all meals served. The automated POS system identifies students as eligible for either a full-paying, reduced-price, or free meal. Students that are required to pay for meals have the option of paying in advance and having the money placed in their personal meal account or paying for each meal as they go through the serving line. Each school's cafeteria operations are connected to the district's wide area network.

MISD Food Service also offers catering services. The Manor High School supervisor manages catering operations. Catering consists of preparing meals for special activities such as board meetings, staff development, extracurricular activities at schools and central office, and principal meetings. Board members, the superintendent, administrators, principals, teachers, staff, and parent groups can request catering for an event. The Food Service director has established menu items and prices. Prices include food and labor.

An outside contractor conducts preventive maintenance on Food Service equipment. MISD maintenance staff repair items related to the physical facilities. MISD custodians clean

the eating areas. Utility and waste removal costs associated with cafeteria operations are also paid by MISD.

MISD participates in the NSLP and the SBP. Sixty seven percent of the district's current students are economically disadvantaged and qualify for free or reduced-price school meals. Food Service served 479,596 breakfasts and 805,394 lunches during 2007–08. Meal participation rates are the number of students eating a meal at school compared to the average daily attendance. In 2007–08, MISD breakfast participation rates were 42 percent and lunch participation rates were 71 percent.

MISD schools met the eligibility criteria for severe need as defined by the USDA and received an additional $0.02 cents for every lunch served and an additional $0.26 for every reduced-price or free breakfast served. The 2007–08 MISD Food Service revenues were $3,228,470 and expenses were $3,233,926. Of the total 2007–08 revenues, federal reimbursements were 72 percent, state reimbursements were 1 percent, and local sales were 27 percent. Food Service had a fund balance of $465,995 as of August 31, 2008.

ACCOMPLISHMENTS

- MISD Food Service has an external auditor randomly conduct unannounced cash drawer audits on a regular basis.

- Cafeteria managers order non-commodity food for their respective campuses on a weekly basis. This process allows for food to be delivered directly to the campus at the right time in the quantities needed.

- Food Service uses 100 percent of the United States Department of Agriculture commodities provided by the National School Lunch Program and School Breakfast Program.

FINDINGS

- MISD Food Service prepares monthly profit and loss statements for the operation as a whole, but does not prepare monthly financial reports such as budget-to-actual comparisons, balance sheets, profit and loss summaries by campus, cash flow statements by campus, and year-to-year comparisons by campus.

- MISD's Food Service has been incurring deficits for the past three years.

- MISD has low breakfast participation despite offering a universal breakfast program where all students can eat breakfast for free.

- MISD's cafeteria operations does not take advantage of opportunities to gain additional customer input and examine other cafeteria improvement options.

RECOMMENDATIONS

- **Recommendation 55: Develop financial reports to enhance financial controls, monitoring of operations, and accountability of Food Service managers.**

- **Recommendation 56: Restore profitability in Food Service operations.**

- **Recommendation 57: Implement innovative break-fast programs and set a goal of raising breakfast participation rates.**

- **Recommendation 58: Develop a plan to improve cafeteria operations.**

DETAILED ACCOMPLISHMENTS

RANDOM AUDITS

MISD Food Service has an external auditor randomly conduct unannounced cash drawer audits on a regular basis. The auditor works for MISD two days a week and randomly selects school cafeterias to visit on an unannounced basis. During the visits, each cash drawer is counted and reconciled to the point-of-sale information. The auditor also verifies that the production reports are up-to-date and that the required Hazardous Analysis and Critical Control Point (HACCP) reports are also current. Any discrepancies with the cash drawer reconciliation or required reports are noted, signed off by the cafeteria manager and then reported to the Food Service director. The reports are maintained in a binder and also used to identify potential problems or areas of needed training.

FOOD ORDERS

Cafeteria managers order non-commodity food for their respective campuses on a weekly basis. This order is placed online through Labatt Food Service (the vendor selected through the Regional Education Service Center 2013 Purchasing Cooperative). This process allows for food to be delivered directly to the campus at the right time in the quantities needed. The Food Service director has identified

specific brands and sizes that cafeteria managers can purchase from the cooperative. This practice enhances cost and quality controls.

COMMODITY USAGE

Food Service uses 100 percent of the United States Department of Agriculture (USDA) commodities provided by the National School Lunch Program. The USDA provides commodities to school districts as a means of lowering food costs. Many school districts either do not use available USDA commodities, or use very little. The amount of USDA commodities that are available to schools depends upon the percentage of economically disadvantaged students enrolled and the district's previous commodity usage. To enable the most use of commodity entitlement dollars, MISD diverts a large portion of their commodities to food processors. The district also participates in the Farm to School Program which enables MISD to use commodity entitlement dollars for fresh fruits and vegetables.

MISD had available and used commodities valued at $136,000 for 2008–09 and has been allocated $165,000 for 2009–10. MISD is able to use all of their commodities due to the emphasis that the Food Service director places on commodity usage and menu planning around available commodities.

DETAILED FINDINGS

MANAGEMENT REPORTING (REC. 55)

MISD Food Service prepares monthly profit and loss statements for the operation as a whole, but does not prepare monthly financial reports such as budget-to-actual comparisons, balance sheets, profit and loss summaries by campus, cash flow statements by campus, and year-to-year comparisons by campus.

Best practices in the food service industry recommend that four financial and operating reports be distributed to district management and the board so they can monitor and evaluate the cash flow of operations and take corrective action if needed. The reports are: (1) budget, (2) profit-and-loss statement, (3) balance sheet, and (4) cash flow statement.

According to the *Cost Control Manual for School Food Service Directors*, the number one requirement for cost control management is an accounting system and procedures that provide accurate and timely financial information and reports. Profit and loss statements should be compared each month, and to the same month one year prior, to spot sudden changes or possible errors. Additionally, profit and loss statements should be distributed to each campus within ten days of month end. **Exhibit 8-1** provides seven financial reporting tools, the optimal frequency that they should be prepared, and whether MISD uses and distributes them to its campus managers.

These financial statements highlight areas of strength in addition to improvement needs. They can also be used as comparisons to prior periods to spot trends, improvements, and declines, allowing management to take appropriate steps in a timely manner. Food Service staff should be able to use these reports to monitor and track key operating and financial measures (for example, net profit or loss, student participation, meals per labor hour, food costs, and wages). The director can also use the reports to identify and discuss favorable and/or unfavorable trends or variances each month and adjust operations as appropriate.

MISD Food Service should develop financial reports to enhance financial controls, monitoring of operations, and accountability of Food Service managers. The Food Service director should develop financial report templates, then generate and distribute monthly profit and loss statements, budget reports, and key operating comparison reports no later than ten days after the end of each month. Goals for financial and operational improvement should also be set for each Food Service manager, and employee evaluations should contain an element for performance against goals. This improvement could be implemented at no cost to the district.

PROFITABILITY (REC. 56)

MISD Food Service has been incurring deficits for the past three years. Food Service had been profitable prior to 2006–07 and had a fund balance of $583,066 on August 31, 2005. Food Service has lost a total of $217,071 since that time, leaving a fund balance of $365,995 as of August 31, 2008. This trend continued into 2008–09 with Food Service losing $20,605 between September 1, 2008 and February 28, 2009. **Exhibit 8-2** summarizes Food Service revenues and expenditures for 2003–04 through 2007–08.

The Food Service director said the main cause of losses is due to opening new schools. When new schools are opened, productivity is not optimized because basic staff is needed to be in place although there are not enough students enrolled in the school to justify the payroll costs. Principals want all meals prepared at their respective campus instead of

EXHIBIT 8-1
MISD FINANCIAL AND MANAGEMENT REPORTING EVALUATION

REPORT/ DESCRIPTION	USES	OPTIMAL FREQUENCY	USED BY THE DISTRICT	DISTRIBUTED TO CAFETERIAS
Budget: Illustrates a plan for financial management according to each account.	Allows informed decisions and financial forecasts for the next year through the use of historical, economic, and demographic data, projected enrollment, menu changes, and changes in operational procedures. Allows a forecast of financial performance for the next year. Allows comparisons between actual and forecasted performance.	Annual with monthly monitoring	Yes, but is not prepared by campus and is not used for monthly monitoring by campus level.	No
Costing food and service.	Allows for informed decision-making about purchases and the continuation of products and services.	Daily	Partially, the director conducts costing of key meal components.	No
Revenue received from lunch and breakfast.	Allows identification of major sources of revenue such as free, reduced-price, paid, a la carte, or other.	Daily	Yes	Yes
Balance Sheet: Illustrates the financial position of the account at a point in time.	Allows a comparison of current balances with balances at the end of the month of the prior year.	Monthly	No	No
Profit and Loss Statement: Illustrates what is left after all expenditures are paid.	Allows identification and analysis of increases or decreases in participation or expenses. Allows identification of school making a profit or experiencing a loss. Allows administrators to determine where key issues/problems exist.	Weekly or Monthly	Yes	No
Statement of Changes: Shows changes in working capital from year to year.	Allows for the monitoring of net increases in working capital requirements.	Annually	Limited to the annual financial report prepared by MISD's external auditor.	No
Key Operating Percentages: Trends, Expenditures, and Revenues over time.	Allows management and staff to monitor expenditures over time including: – Food cost percentage – Labor cost percentage – Other costs percentage – Break-even point – Inventory turnover – Participation rates – Average daily labor costs – Average hourly labor costs	Monthly	Limited to meal participation rates.	Limited to meal participation rates.

SOURCE: Cost Control Manual for School Food Service Directors by Dorothy Pannell and interviews with MISD Food Service staff, March 2009.

producing meals at established campuses and transporting them to the newly opened campus.

Data analyzed for this review indicate that there are a number of factors contributing to operational losses: (1) productivity is lower than industry standards resulting in labor costs that absorb a higher percentage of revenues than industry

EXHIBIT 8-2
MISD FOOD SERVICE
ANNUAL REVENUES, EXPENDITURES, AND FUND BALANCE
2003–04 THROUGH 2007–08

CATEGORY	2003–04	2004–05	2005–06	2006–07	2007–08
Local	$525,646	$571,521	$622,173	$685,541	$864,340
State	$19,906	$16,725	$18,772	$23,385	$27,665
Federal	$1,039,797	$1,303,144	$1,659,926	$1,896,626	$2,396,080
Total Revenues	**$1,585,349**	**$1,891,390**	**$2,300,871**	**$2,605,552**	**$3,288,085**
Expenditures	**$1,499,968**	**$1,733,792**	**$2,408,915**	**$2,709,123**	**$3,293,541**
Profit/Loss	**$85,381**	**$157,598**	**($108,044)**	**($103,571)**	**($5,456)**
Fund Balance	**$425,468**	**$583,066**	**$475,022**	**$371,451**	**$365,995**

Source: MISD Audited Financial Statements Combining Statement of Revenues, Expenditures and Changes in Fund Balance - Nonmajor Governmental Funds for the respective years.

standard; (2) Food Service was not charging MISD enough for full-priced breakfasts served; (3) menus are not pre-and post-costed to control food costs; (4) poor student meal status identification has resulted in meals being served, but not reimbursed; and (5) inventory records are not perpetual nor electronically maintained

Exhibit 8-3 displays Food Service revenues and expenditures for six months of 2008–09.

MISD Food Service is performing below industry standards for productivity. Productivity in food service operations is measured in meals per labor hour (MPLH). The food service industry established the MPLH standards based upon the number of meals and meal equivalents served and the type of food preparation. It is a critical indicator that many successful food service organizations use to control labor costs. One reimbursable lunch is considered a meal. Breakfast, a la carte sales, and snacks are converted to one reimbursable lunch based upon a formula prior to calculating MPLH. Most districts use MPLH as a guide to staffing levels as it provides the necessary information to make quick labor adjustments as needed.

The Food Service director has not made individual campus cafeteria managers responsible for profitability at their respective campuses. Instead, the Food Service director monitors MPLH by campus on a monthly basis and uses that as a tool to manage campus cafeterias. The district uses a point-of-sale information system to calculate MPLH in accordance with industry standards. MPLH is skewed at some schools because of off-campus eating at Excel High School. Students that eat at that campus are attending from other campuses and are coded to the home campus instead of Excel for attendance and meal participation reporting.

The Food Service director established employee productivity expectations for all of its school cafeterias based on MPLH targets. The expectations are 15–20 MPLH for elementary campuses and 13–19 MPLH for secondary campuses. Excel High School and Manor New Tech High are not achieving these goals. However, industry MPLH is based upon the number of meals served and not the type of campus. The food service industry recognized that many factors go into meal preparation, including the use of automation in preparing and serving foods. To accommodate these factors, two MPLH standards have been developed: low end are those where less automation is used, and high end where food preparation and serving are more automated.

Exhibit 8-4 shows industry standards and the district's actual MPLH by campus for September 1, 2008 through March 15, 2009. Compared to industry standards, the district's average MPLH is one MPLH below the low standard and three MPLH below the high standard. At the campus level, four schools are within the low standard and only one school is within the high standard.

Labor is the largest food service operation expense at MISD. **Exhibit 8-5** provides an analysis of revenue and expenditures as a percentage of revenues from 2004–05 through 2008–09. MISD Food Service budgeted 58 percent of their revenues towards salaries in 2008–09, an increase from 42 percent in 2004–05.

When applying commonly accepted industry standards for school food service financial management to MISD's Food Service budget for 2008–09, the results indicate that MISD is allocating too much to labor. A comparison of MISD's labor expenditure as a percentage of revenue to industry standards, as identified in *Managing Child Nutrition Programs:*

EXHIBIT 8-3
MISD FOOD SERVICE
DETAILED REVENUE AND EXPENSES
SEPTEMBER 1, 2008 THROUGH FEBRUARY 28, 2009

CATEGORY	SEPT	OCT	NOV	DEC	JAN	FEB	TOTAL	AVG. PER MONTH	% OF TOTAL REV./EXP.
Breakfast	$81,341	$91,203	$69,414	$62,776	$70,786	$80,494	$456,014	$76,002	21%
Lunch	$220,665	$228,477	$171,622	$157,990	$186,343	$209,410	$1,174,507	$195,751	54%
Snack	$2,292	$5,674	$4,340	$4,433	$5,654	$6,971	$29,364	$4,894	1%
Cash	$100,880	$112,010	$78,150	$59,767	$78,120	$86,328	$515,255	$85,876	24%
Total Revenue	**$405,178**	**$437,364**	**$323,526**	**$284,966**	**$340,903**	**$383,203**	**$2,175,140**	**$362,523**	**100%**
Labor	$180,000	$180,000	$180,000	$180,000	$180,000	$180,000	$1,080,000	$180,000	49%
Food/Other	$196,650	$207,123	$203,271	$108,314	$182,488	$199,899	$1,097,745	$182,958	50%
Misc.	$3,000	$3,000	$3,000	$3,000	$3,000	$3,000	$18,000	$3,000	1%
Total Expenses	**$379,650**	**$390,123**	**$386,271**	**$291,314**	**$365,488**	**$382,899**	**$2,195,745**	**$365,958**	**100%**
Profit/Loss	**$25,528**	**$47,241**	**($62,745)**	**($6,348)**	**($24,585)**	**$304**	**($20,605)**	**($3,434)**	

SOURCE: MISD Food Service Director and MJLM calculations, March 2009.

EXHIBIT 8-4
MISD FOOD SERVICE
MEALS PER LABOR HOUR BY CAMPUS
SEPTEMBER 1, 2008 THROUGH MARCH 15, 2009

SCHOOL	AVG. MEAL EQUIV. *	ACTUAL MPLH	INDUSTRY STANDARD LOW END	INDUSTRY STANDARD HIGH END	VARIANCE LOW END	VARIANCE HIGH END
Manor High School	932	13	19	21	-6	-8
Excel High School	67	7	8	10	-1	-3
Manor New Tech High	242	11	12	14	-1	-3
Manor Middle School	835	17	18	20	-1	-3
Decker Middle School	681	15	16	18	-1	-3
Manor Elementary	819	17	18	20	-1	-3
Bluebonnet Trail Elementary	870	16	18	20	-2	-4
Decker Elementary	711	17	17	19	0	-2
Blake-Manor Elementary	713	17	17	19	0	-2
Presidential Meadows Elementary	683	17	16	18	1	-1
Oak Meadows Elementary	571	17	15	17	2	0
Totals/Averages	**7,124**	**15**	**16**	**18**	**-1**	**-3**

* = Calculated from total student lunches + (total student breakfast / 1.5).
SOURCE: MISD Average Summary Report for 09-01-2008 through 03–15–2009 and MISD Meals Per Labor Hour Reports for 09–01–2008 through 03–15–2009; "Cost Control For School Foodservices," Third Edition, by Dorothy Pannell-Martin, Revised July 2000.

Leadership for Excellence, Second Edition (2008), indicates that MISD is currently allocating at least 13 percent more of its revenue to labor than the recommended industry standard (**Exhibit 8-6**).

The Food Service director does not prepare detailed pre- and post-costing of menus to control food costs and expenses. Pre-costing menus is a financial tool used to determine available revenues and appropriate budgeting of food costs. Post-costing menus is a tool used to monitor efficient food usage and minimal food waste. The Food Service director plans menus on an annual basis and develops production records for campus cafeteria managers to complete on a daily basis. MISD controls the portion size of all food served by using proper serving equipment and pre-plating most menu

EXHIBIT 8-5
MISD REVENUE AND EXPENDITURE PERCENTAGES
AS A PERCENTAGE OF REVENUE
2004–05 THROUGH 2008–09

CATEGORY	2004–05 PERCENTAGE OF ACTUAL REVENUES	2005–06 PERCENTAGE OF ACTUAL REVENUES	2006–07 PERCENTAGE OF ACTUAL REVENUES	2007–08 PERCENTAGE OF ACTUAL REVENUES	2008–09 PERCENTAGE OF BUDGETED REVENUES
Revenues					
Local	30%	27%	26%	26%	25%
State	1%	1%	1%	1%	1%
Federal	69%	72%	73%	73%	74%
Total Revenues	**100%**	**100%**	**100%**	**100%**	**100%**
Expenditures					
Payroll	42%	42%	49%	46%	58%
Contracted Services	1%	1%	1%	1%	1%
Food	37%	39%	42%	42%	35%
Supplies	10%	9%	10%	11%	5%
Utilities & Trash Removal	1%	0%	0%	0%	1%
Other Operating Expenditures	0%	0%	0%	0%	0%
Capital Outlay	0%	14%	0%	0%	0%
Total Expenditures	**91%**	**105%**	**102%**	**100%**	**100%**

NOTE: The financial information provided by MISD does not agree with the audited financial statements.
SOURCE: Calculated from expenditure details provided by MISD Food Service Director and Chief Financial Officer, April 2009.

EXHIBIT 8-6
MISD EXPENDITURES AS A PERCENTAGE OF REVENUE
2008–09 BUDGET

CATEGORY	REVENUE	EXPENDITURES	EXPENDITURES AS A PERCENTAGE OF BUDGETED REVENUES	INDUSTRY STANDARDS	MISD PROJECTED EXPENDITURE USING INDUSTRY STANDARD	DOLLAR VALUE OF VARIANCE
Local/State/ Federal Revenue	$3,164,318	N/A	N/A	N/A	N/A	N/A
Labor	N/A	$1,835,541	58%	40-45%	$1,360,657	$474,884*

*Based on 45 percent as the industry standard.
SOURCE: MISD Food Service Budget 2008–09 and Managing Child Nutrition Programs: Leadership for Excellence, Second Edition, by Joseph Martin PhD, RD, LD, and Charlotte Oakley, PhD, RD, FADA (2008).

items. **Exhibit 8-7** uses sample menus for one week of breakfast and lunch at MISD to calculate the average food cost for breakfast at $0.74 and lunch at $1.47.

Campus registrars do not always code a student as free or reduced-price when they first enter school. Students that enter MISD from another district and say that they were approved for free or reduced-price meals at their previous district must be granted that status without completing another application. This practice is based upon MISD's application of the USDA's *Eligibility Guidance for Schools*

Meals Effective July 12, 2008 that states a local education agency (LEA) may accept a copy of a transferred student's application from another LEA. MISD has interpreted this policy to mean that they will accept the family's word until the previous district provides a copy of the free or reduced-price meal application to the district. The district can also accept the transferred student's status as an approved migrant.

MISD registrars are required to obtain the free and reduced-price meal applications from either these student's parent/

EXHIBIT 8-7
MISD SAMPLE COST OF ONE WEEK'S MENU
2008–09

Breakfast Menu Cost											
Monday	**Cost**	**Tuesday**	**Cost**	**Wednesday**	**Cost**	**Thursday**	**Cost**	**Friday**	**Cost**	**Average**
Breakfast Pizza	$.33	Pig In A Blanket	$.32	Breakfast Bagel	$.18	Sausage Biscuit	$.31	Cinnamon Toast	$.25	-
Juice	$.17	Juice	$.17	Juice	$.17	Juice	$.17	Juice	$.17	-
Milk	$.22	Milk	$.22	Milk	$.22	Milk	$.22	Milk	$.22	-
Condiments and Paper	$.03	Condiments and Paper	$.05	Condiments and Paper	$.22	Condiments and Paper	$.05	Condiments and Paper	$.03	-
Total	**$.75**	**Total**	**$.76**	**Total**	**$.79**	**Total**	**$.75**	**Total**	**$.67**	**$.74**
Lunch Menu Cost											
Monday	**Cost**	**Tuesday**	**Cost**	**Wednesday**	**Cost**	**Thursday**	**Cost**	**Friday**	**Cost**	**Average**
Chicken Nuggets	$.45	Mini Corn Dogs	$.33	Taco	$.55	Chicken Pot Pie	$.90	Chicken Burger	$.47	-
Potatoes/ Gravy	$.14	Baked Fries	$.10	Charro Beans	$.33	Green Beans	$.10	Burger Salad	$.11	-
Green Beans	$.10	Broccoli w/ Cheese	$.08	Lettuce & Tomato	$.11	Peaches	$.09	Tater Tots	$.47	-
Apple Crisp	$.15	Pears	$.18	Spanish Rice	$.08	Roll	$.18	Fruit Cocktail	$.04	-
Roll	$.18			Orange-Pineapple Jello	$.15	Oatmeal Raisin Cookie	$.07	Sherbet Cup	$.26	-
Milk	$.22	Milk	$.22	Milk	$.22	Milk	$.22	Milk	$.22	-
Condiments and Paper	$.11	Condiments and Paper	$.15	Condiments and Paper	$.11	Condiments and Paper	$.09	Condiments and Paper	$.19	-
Total	**$1.35**	**Total**	**$1.06**	**Total**	**$1.55**	**Total**	**$1.65**	**Total**	**$1.76**	**$1.47**

SOURCE: MISD Food Service Director, April 2009.

guardian or the previous school district as evidence to verify that student is eligible for free or reduced-price meals. These students are initially coded as full-paying within the district's point-of-sale system and the district does not claim federal reimbursement for them. Delays in obtaining proof of free or reduced-price classification can result in many meals being claimed by the district at a lower federal reimbursement level. This represents lost revenues, increased food cost, and contributes to the overall operational loss of Food Service.

MISD Food Service was unable to claim 2,627 meals for a total of $5,333 from September 1, 2008 through January 31, 2009. Presidential Meadows Elementary had the most unclaimed meals with 656, followed by Blake Manor Elementary with 496. **Exhibit 8-8** provides a summary by

campus of unclaimed lunches from September 1, 2008 through January 31, 2009.

MISD Food Service does not maintain electronic inventory records nor are perpetual records kept on how much inventory should be on hand at each location. Every cafeteria manager is required to complete a physical inventory each week. Managers are provided print outs of what they have ordered each week of that particular month and are then required to write what inventory is on-hand next to the respective item on the order sheet. Order sheets are then submitted to the Food Service director where they are maintained in a binder. During onsite visits of cafeterias, the review team noted that inventory was maintained at low levels.

The district's menu planning information system provides meal production and perpetual inventory modules that

EXHIBIT 8-8
MISD UNCLAIMED LUNCHES BY CAMPUS
SEPT. 1, 2008 THROUGH JAN. 31, 2009

SCHOOL	SEPT	OCT	NOV	DEC	JAN	TOTAL	AVG. REIMBURSE-MENT PER MEAL(1)	UNCLAIMED REVENUE
Presidential Meadows Elementary	333	108	55	47	113	656	$2.03	$1,332
Blake Manor Elementary	136	135	97	74	54	496	$2.03	$1,007
Bluebonnet Trail Elementary	156	73	60	22	51	362	$2.03	$ 735
Decker Elementary School	181	66	50	6	39	342	$2.03	$694
Decker Middle School	115	33	5	7	27	187	$2.03	$380
Oak Meadows Elementary	90	31	16	20	22	179	$2.03	$363
Manor High	38	46	24	14	14	136	$2.03	$276
Excel High	83	6	9	5	12	115	$2.03	$233
Manor Elementary School	36	8	10	15	24	93	$2.03	$189
New Tech High	18	20	7	7	9	61	$2.03	$124
Manor Middle School	0	0	0	0	0	0	$2.03	$0
Total Unclaimed Meals	1,186	526	333	217	365	2,627		
Avg. Reimbursement per Meal[1]	$2.03	$2.03	$2.03	$2.03	$2.03	$2.03	$0	$0
Total Unclaimed Revenues	$2,407.58	$1,067.78	$675.99	$440.51	$740.95	$5,332.81	$0	$5,333

[1]Average reimbursement rate based upon the distribution of meals by meal type - Free (70%) Reduced (12%) and Paid (18%).
SOURCE: MISD Food Service Director, March 2009.

interface with each other and the menu planning module. These include meal production planning and actual results, bidding, purchasing, and warehouse components. These modules can be used to automate food production records, food orders, and other food inventory procedures. However, the district has not purchased these modules, and these functions are currently performed and documented using manual spreadsheets.

Atlanta Public Schools in Atlanta, Georgia has a food service information management system that integrates menu planning with production, purchasing, and inventory. The nutritionist enters menus in the system. Each school then reviews their food inventory and places a grocery order online. The information system then compares the menu requirements to recorded inventory on hand to ensure that the grocery order is accurate and complete. The system then

consolidates each school's grocery order into one and places the order with the approved suppliers. Delivery addresses and original orders are maintained so that the suppliers know which amounts to deliver to each school.

MISD should implement the following actions in order to restore profitability in Food Service operations:

- Reduce labor costs by establishing MPLH aligned to industry standards for each school and monitor MPLH reports to make appropriate staffing adjustments. Reducing labor to 45 percent of revenues could save the district $474,884 a year.

- Establish procedures to hold campus cafeteria managers responsible for the profitability of their operations. This effort can be implemented at no cost.

- Code students to the Excel High School when they are attending there. This task can be implemented at no cost and would allow for more accurate monitoring of MPLH.

- Pre- and post-cost menus each week. The combination of financial reports, along with menu costing reports will enable the staff to compare the department's actual results with budgeted figures and prior-year results. This undertaking can be implemented at no cost.

- Establish procedures with school registrars to ensure that all students are accurately coded as free or reduced-price on their first day of school. This effort would provide an additional $5,333 in federal reimbursements.

- Maintain an electronic production and perpetual inventory. Food Service should purchase the production, perpetual inventory, bidding, purchasing, and warehouse add-on modules of the menu planning information system. The one-time cost for this purchase is $11,045 and annual maintenance fees would be $7,670 beyond the initial purchase year, for a total five year cost of $30,680 ($7,670 x 4 years).

Exhibit 8-9 displays a table of the projected costs and savings for this recommendation.

Implementing these recommendations would result in a one-time cost of $11,045 and could provide an additional $472,547 per year towards the Food Service operations for a total five year savings of $2,370,405.

BREAKFAST PARTICIPATION RATES (REC. 57)

MISD has low breakfast participation despite offering a universal breakfast program where all students can eat breakfast for free. Each student in MISD is categorized as free, reduced-price, or full paying. These categories determine the amount of federal reimbursement the district will receive per meal. Meals for students categorized as free receive the largest reimbursement, while meals for full paying students receive the smallest reimbursement. While the percentage of eligible students eating breakfast has increased since 2005–06, only 53 percent of students eligible for free meals, 49 percent eligible for reduced-price meals, and 35 percent of full-paying students ate breakfast at school between September 1, 2008 and March 15, 2009.

Breakfast is served in each school's cafeteria beginning one hour prior to the first class. The district supplements the remaining breakfast meal costs that are not covered by federal reimbursement. MISD does not offer alternative breakfast programs such as curbside breakfast-in-a bag, breakfast in the classroom, or breakfast on the bus. By not having alternative options for acquiring school breakfast, MISD is not ensuring that all children are receiving a nutritional breakfast, and the district is not maximizing federal reimbursement revenues.

Exhibit 8-10 provides breakfast participation rates from 2005–06 through March 15, 2009.

Exhibit 8-11 shows that Food Service missed potential revenues of up to $190,288 in federal and local reimbursements because eligible free and reduced-price meal students are not eating school breakfast. The amount of potential lost revenue could increase in future years since MISD demographics are experiencing a shift towards more students being qualified for free meals and less being reduced-price and full-paying students.

According to the Texas Association of School Nutrition (TASN), national studies have identified the following benefits from increased breakfast participation:

- increased attendance;

EXHIBIT 8-9
PROJECTED COSTS AND SAVINGS

ACTIVITY	ANNUAL SAVINGS (COST)	5 YEAR SAVINGS (COST)
Reduce labor cost to industry standards	$474,884	$2,374,420
Accurately code all students as free/reduced/full paid upon initial entry	$5,333	$26,665
Annual maintenance fees for production, inventory, and warehouse modules over 5-year period*	($7,670)	($30,680)
Total Annual Savings	$472,547	$2,370,405
One Time Cost for production, inventory, and warehouse modules	($11,045)	($11,045)

*No maintenance fee for first year, so total first year savings would be $480,217
Source: Review team calculations.

EXHIBIT 8-10
MISD BREAKFAST PARTICIPATION
2005–06 THROUGH MARCH 15, 2009

		ELIGIBILITY			PARTICIPATION		
	TOTAL STUDENTS	% ELIGIBLE FREE	% ELIGIBLE REDUCED	% PAID	% ELIGIBLE FREE	% ELIGIBLE REDUCED	% PAID
Breakfast 2005–06	4,565	58%	12%	30%	43%	39%	26%
Breakfast 2006–07	5,187	59%	12%	30%	43%	39%	30%
Breakfast 2007–08	5,778	57%	12%	30%	47%	43%	33%
Breakfast September 1, 2008 – March 15, 2009	6,255	63%	11%	25%	53%	49%	35%
Increase/decrease over 2005–06	1,690	5%	-1%	-5%	10%	10%	9%

SOURCE: MISD District Average Eligibility and Participation Summary Reports for the respective years.

EXHIBIT 8-11
MISD POTENTIAL MISSED BREAKFAST REVENUES
2007–08 USDA REIMBURSEMENT RATE

MEAL TYPE	ELIGIBLE FREE AND REDUCED BREAKFASTS PER DAY	AVERAGE BREAKFASTS SERVED PER DAY	AVERAGE BREAKFASTS NOT SERVED PER DAY (BASED UPON 75% PARTICIPATION RATE)	2007–08 USDA BREAKFAST REIMBURSE-MENT RATE	POTENTIAL DAILY LOST USDA REIMBURSE-MENT REVENUE[1]	POTENTIAL DAILY LOST MISD REIMBURSE-MENT REVENUE[2]	TOTAL POTENTIAL DAILY LOST REVENUE
Free Breakfast	3,322	1,561	931	$1.61	$1,499	$0	$1,499
Reduced-price Breakfast	718	308	231	$1.31	$303	$69	$372
Full-price Breakfast	1,738	565	739	$0.24	$177	$554	$731
Total	**5,778**	**2,434**	**1,901**		**$1,979**	**$623**	**$2,602**
Total Annual Lost USDA Reimbursement							$330,493
Total Annual Lost MISD Reimbursement							$104,041
Total Annual Missed Breakfast Revenue[3]							**$434,534**
Total Annual Food Costs[4]							**$152,087**
Total Annual Labor Costs[5]							**$92,159**
Net Annual Additional Revenues							**$190,288**

NOTE: Calculations in exhibit are rounded off.
[1]Potential daily lost revenue = average breakfasts not served per day X USDA breakfast reimbursement rate.
[2]Potential daily lost revenue = average breakfasts not served per day X MISD breakfast reimbursement rate of $.30 for reduced breakfast and $.75 for full-price breakfast.
[3]Annual missed breakfast revenue = total daily lost breakfast revenue X 167 school meal days in 2007–08.
[4]Food cost based upon 2008–09 Food Service budget. Food costs are 35% of revenues.
[5]Additional Labor cost based upon increasing all cafeteria worker hours to 8 hours per day X 167 school meal days 2007–08.
SOURCE: MISD District Average Eligibility and Participation Summary Report, 2007–08 and MJLM Calculations.

- increased student attention;
- improved student behavior;
- decreased dropout rates;
- reduced disciplinary referrals;
- increased parental and community involvement;
- reduced tardiness; and
- measurable improved test scores.

Studies conducted by the Minnesota Department of Children, Families and Learning; the University of Minnesota; and the University of Connecticut proved that students who eat school breakfast benefit nutritionally and educationally. According to the study results, students eating breakfast at school said they feel good, are happy, and are more alert during the day. Conversely, students who do not eat breakfast state that they may feel bad, are angry, sick, and bored throughout the school day. The study revealed that students who eat breakfast experience the following benefits:

- have increased math and reading scores;

- have fewer visits to school nurses; and

- have improved classroom behavior.

Other Texas school districts have implemented programs designed to increase their breakfast participation rates. For example, Lueders High School in Lueders-Avoca Consolidated ISD increased their 50 percent breakfast participation rate to 98 percent by offering breakfast at 9 AM instead of 7:30 AM Additionally, Houston ISD has increased its breakfast participation by adding grab and go mobile carts and delivering breakfast in the classroom.

The district should implement innovative breakfast programs and set a goal of raising breakfast participation rates. Programs such as breakfast in the classroom and breakfast in a bag provide students with greater and more convenient options to eat breakfast. The district should also consider offering a later breakfast for secondary campuses. If the district implemented grab and go, with mobile carts strategically placed, students could grab a breakfast bag in-between classes. Additionally, the district should set a goal of raising participation rates to a minimum of 75 percent. This effort would support the district's universal breakfast program where every student can eat breakfast for no charge.

Exhibit 8-12 shows annual and five year projections of potential lost revenue to Food Service based on 2009–10 USDA meal reimbursement rates. If the district raised their breakfast participation rate to 75 percent, MISD could realize additional USDA revenues of $345,356 annually. The district would also bear costs associated with supplementing the Food Service operation on a per meal basis for breakfast due to the Universal Breakfast Program. These annual costs would be $104,041 (MISD per meal reimbursement) and $249,448 (additional food and labor to meet increased demand), for a total of $353,489. This would result in the district incurring an annual cost of $8,133 and a five year cost of $40,665.

CAFETERIA OPERATIONS (REC. 58)

MISD's cafeteria operations does not take advantage of opportunities to gain additional customer input and examine other cafeteria improvement options.

MISD uses Nutrikids to develop menus according to the United States Department of Agriculture (USDA) and *Texas School Nutrition Policy* requirements. The Food Service director develops menus and distributes them to cafeteria employees along with the recipes. Menus are also published on the district's website but do not provide the nutrient analysis of menu items. The 2008–09 lunch and breakfast menus are based upon a monthly cycle, with the same menu each month for the entire school year. School menus showed that in 2008–09 the lunch main entrées were only served once or twice per month. The following lunch entrées were served in 2008–09: steak fingers, chili cheese dog, turkey wrap, chicken fajitas, hamburgers, chicken nuggets, mini corn dogs, tacos, chicken pot pie, chicken burger, grilled cheese sandwich, beef chalupas, chicken tenders, nachos, spaghetti, and enchiladas.

MISD's Food Service director does not obtain student and staff input for menus but has conducted surveys of students and teachers each year. Reviewed survey responses indicated students were happy with the meals and service they receive. However, when an independent survey was conducted by the review team, 65 percent of students surveyed responded that they disagree that cafeteria food looks and tastes good while only 32 percent of teacher survey responses shared that opinion.

Many school districts have established wellness or nutrition advisory committees to assist with menu planning and nutrition marketing. Clint ISD has also established a test kitchen where students, teachers, and principals are invited to participate in preparing and tasting of different menu items.

Although the majority of students feel that the food is not good, MISD has a strong lunch participation rate. **Exhibit 8-13** shows the distribution of students by free or reduced eligibility and the participation rate by free or reduced eligibility from 2005–06 to 2007–08. As of March 15, 2009, the district's participation rate included 89 percent of students eligible for free lunch; 85 percent of students eligible for reduced-priced lunch; and 59 percent of students who pay for lunch.

The review team visited three campus cafeterias, both elementary and secondary, during lunch and observed the following:

EXHIBIT 8-12
MISD POTENTIAL MISSED BREAKFAST REVENUES
2009–10 USDA REIMBURSEMENT RATE

MEAL TYPE	AVERAGE BREAKFASTS NOT SERVED PER DAY 2007–08 (BASED UPON 75% PARTICIPATION RATE)	2008–09 USDA BREAKFAST REIMBURSEMENT RATE	POTENTIAL DAILY LOST USDA REIMBURSEMENT REVENUE	MISD BREAKFAST REIMBURSEMENT RATE	POTENTIAL DAILY LOST MISD REIMBURSE-MENT REVENUE	TOTAL POTENTIAL DAILY LOST REVENUE
Free Breakfast	931	$1.68	$1,564	$0	$0	$1,564
Reduced-price Breakfast	231	$1.38	$319	$0.30	$69	$388
Full-price Breakfast	739	$0.25	$185	$0.75	$554	$739
Total	**1901**	**N/A**	**$2,068**	**N/A**	**$623**	**$2,691**
Total Annual Lost USDA Reimbursement[1]						$345,356
Total Annual Lost MISD Reimbursement[2]						$104,041
Total Annual Missed Breakfast Revenue[3]						**$449,397**
Total Annual Food Costs[4]						**$157,289**
Total Annual Labor Costs[5]						**$92,159**
Total Net Annual Potential Additional Revenues to the Food Service operation						**$199,949**
Annual Net Impact to District						**($8,133)**
Total Net Five Year Impact to District						**($40,665)**

NOTE: Calculations in exhibit are rounded off.
[1]Annual lost USDA Reimbursement = total potential daily lost USDA reimbursement revenue X 167 school meal days in 2007–08.
[2]Annual lost MISD Reimbursement = total potential daily lost MISD reimbursement revenue X 167 school meal days in 2007–08.
[3]Annual lost breakfast revenue = total annual USDA reimbursement + total annual MISD reimbursement.
[4]Food cost based upon estimated 2009–10 Food Service revenues. Food costs are 35% of revenues.
[5]Additional labor cost based upon increasing all cafeteria worker hours to 8 hours per day X 167 school meal days 2007–08.
SOURCE: MISD District Average Eligibility and Participation Summary Report, 2007–08 and MJLM calculations.

EXHIBIT 8-13
COMPARISON OF MISD'S FOOD SERVICE KEY PARTICIPATION STATISTICS
2005–06 THROUGH MARCH 15, 2009

		ELIGIBILITY			PARTICIPATION		
	TOTAL STUDENTS	% ELIGIBLE FREE	% ELIGIBLE REDUCED	% PAID	% ELIGIBLE FREE	% ELIGIBLE REDUCED	% PAID
Lunch							
Lunch 2005–06	4,565	58%	12%	30%	74%	69%	44%
Lunch 2006–07	5,187	59%	12%	30%	75%	71%	51%
Lunch 2007–08	5,778	57%	12%	30%	79%	76%	54%
Lunch September 1, 2008 – March 15, 2009	6,255	63%	11%	25%	89%	85%	59%
Increase over 2005–06	1,690	5%	-1%	-5%	15%	16%	15%

SOURCE: MISD Food Service Director District Average Eligibility and Participation Summary Reports for the respective years.

- Lines moved quickly.

- Almost all students finished what was on their trays.

- Elementary school Food Service staff were very helpful to the students while secondary school staff tended to ignore the students.

- Manor High School ran out of taco shells on the serving line less than five minutes into the lunch period, causing a back-up of students in the line. Food Service staff was also scooping the taco meat onto plates as students came through the line instead of pre-plating. The review team observed two students get through the line without paying for their food.

- Manor High School staff stood around while the line ran out of taco shells.

- Food was not displayed in a creative or inviting manner in the lunch serving lines. Other districts often use decorative signage to inform and draw attention to specific foods. Districts can use creative ways to display foods such as fruits being displayed in clear bowls rather than in the long metal serving pans.

- The cafeterias contained no nutritional information displays, signs, or posters.

Many school districts have implemented food courts and created mini serving areas within the cafeteria that have a restaurant appeal. Districts can name each area and have signage, decorative menus, and awnings that appeal to students. Districts can also have convenient stand alone containers for quick grab items such as drinks, ice creams, fruits, and snacks. Manor High School has adopted a similar concept in that the main serving line is named Mustang Café, the a la carte line is named the Pit Stop, a salad bar line is named Green Acres, and the pizza area is named Pronto Pizza. While each of these have separate entrances and fully staffed serving lines, none have decorative awnings or menu boards. On the day that the review team visited the Manor High School cafeteria, the main entrée was tacos. The Pit Stop and Mustang Café were busy while Pronto Pizza had a few students and Green Acres had almost no students.

MISD should develop a plan to improve cafeteria operations. This plan should include:

- Educating teachers about the effects on children of not eating breakfast. This effort could include the development and launching of a campaign to educate students and their families about the benefits of eating a healthy breakfast. The material would advertise the universal breakfast program by explaining that all students are eligible to eat breakfast at school at no charge. The district has many communication venues that Food Service could use at no cost such as the monthly meal menus, the district's quarterly newsletters, and the district's website.

- Establishing an advisory committee composed of principals, school staff, and student council representatives to meet regularly to discuss cafeteria improvement opportunities and ways to educate students and parents on nutritional guidelines and the benefits of healthy eating. Food Service could also establish a test kitchen in one of the campus kitchens to develop and test menu items with students and staff that are appealing to students while meeting nutritional requirements. This can be implemented at no cost.

- Updating menus to include nutritional content, which can be implemented at no cost.

Some additional options that districts can use to improve the presentation of their cafeteria include:

- Creating art challenges for students to design and paint posters and murals in campus cafeterias.

- Collaborating with campus art teachers and classes to design decorative menu boards.

- Contacting other school districts and the regional education service center for ideas on food presentation.

FISCAL IMPACT

RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
55. Develop financial reports to enhance financial controls, monitoring of operations, and accountability of Food Service managers.	$0	$0	$0	$0	$0	$0	$0
56. Restore profitability in Food Service operations.	$480,217	$472,547	$472,547	$472,547	$472,547	$2,370,405	($11,045)
57. Implement innovative breakfast programs and set a goal of raising breakfast participation rates.	($8,133)	($8,133)	($8,133)	($8,133)	($8,133)	($40,665)	$0
58. Develop a plan to improve cafeteria operations.	$0	$0	$0	$0	$0	$0	$0
Totals	**$472,084**	**$464,414**	**$464,414**	**$464,414**	**$464,414**	**$2,329,740**	**($11,045)**

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CHAPTER 9

TRANSPORTATION

MANOR INDEPENDENT SCHOOL DISTRICT

CHAPTER 9. TRANSPORTATION

Chapter 34 of the Texas Education Code authorizes, but does not require, Texas school districts to provide transportation for students in the general population to and from home and school, school and career and technology training locations, and extracurricular activities. The federal Individuals with Disabilities Education Act (IDEA) requires that a school district provide transportation for students with disabilities if the district also provides transportation for students in the general population, or if students with disabilities require transportation to special education services. The federal McKinney-Vento Act requires school districts to provide transportation for homeless students to their school of origin even if the student no longer lives within the district.

Manor Independent School District (MISD) encompasses the City of Manor and portions of the City of Austin and Travis County. According to the Texas Education Agency's (TEA) 2007–08 transportation report, the district transported students a total of 728,123 miles over 176 school days at a cost of $3.14 per mile for the regular program and $4.44 for the special program. TEA allocated state funds based upon a linear density of 0.900 to 1.149 at $0.97 per mile. Total operations costs were $2,909,919, with a state allotment of $580,982.

MISD contracts with Petermann, Ltd. for management and operation of the district's transportation services. The MISD fleet consists of 68 buses, 10 of which are used as spares in case of a breakdown. The district operates 48 daily regular routes and eight special program routes with a total of 56 drivers and five monitors.

ACCOMPLISHMENTS

- Transportation Department management has begun new practices designed to increase employee involvement in the decision making process, and has opened up extra assignments to employee scrutiny.

- The district has instituted staggered bell times that allow each bus to serve two or more schools.

- The district has established a policy to install cameras on all school buses.

FINDINGS

- MISD has too many driver positions for the current service level.

- The Transportation Department has not conducted a systematic review of the productivity of its routes, not fully using its computerized routing and scheduling program.

- The district's fleet is not consistent with ridership levels.

- MISD has a procurement underway to add six propane-fueled buses to its fleet, but it has not determined if this is a one-time trial or the first step in the full conversion of the fleet to a new fuel.

- The district does not have a bus replacement plan.

- The Transportation Department uses only one level of preventive maintenance checks while most manufacturers recommend a graduated program of four or more levels.

- MISD does not have an incentive policy for mechanics to increase their skills and receive certifications.

- The Transportation Department does not maintain the "white fleet", the support vehicles of the district.

- MISD does not have a record of the board officially designating hazardous route areas in accordance with TEA regulations.

- The district has a policy of offering transportation to any student that requests it. This policy provides a high level of service, but requires the district to bear the full cost of transporting students who live within two miles of a school.

RECOMMENDATIONS

- **Recommendation 59: Review the number of driver positions.**

- **Recommendation 60: Obtain training on the district's electronic routing software for the routing coordinator and upgrade the district's routing software to improve routing efficiency.**

- **Recommendation 61: Establish the fleet mix to match the vehicle size to ridership.**

- **Recommendation 62: Incorporate into a long-term bus replacement plan an explanation of how propane will be integrated into the fleet and how the fleet mix will change to include small buses.**

- **Recommendation 63: Implement a regular bus procurement schedule that replaces large buses after 15 years and small buses after 10 years.**

- **Recommendation 64: Revise preventive mainte-nance practices to incorporate more sophisticated tracking of needed service intervals.**

- **Recommendation 65: Encourage mechanics to become Automotive Service Excellence (ASE) certified and offer a bonus for those mechanics that successfully receive their certification.**

- **Recommendation 66: Consolidate all vehicle main-tenance under the Transportation Department.**

- **Recommendation 67: Prepare a board action that designates the hazardous routes within the district per the TEA requirements.**

- **Recommendation 68: Consider the financial im-pact of providing transportation to all students.**

DETAILED ACCOMPLISHMENTS

INCREASED EMPLOYEE INVOLVEMENT

The district contracted with Petermann, Ltd. in 2008 to provide and manage transportation services for the district. The new general manager has begun new practices to involve employees in the decision-making process, and has opened up extra assignments to employee scrutiny. An Employee Action Committee has been established to discuss morale issues and to develop fair practices in consultation with the general manager. New procedures have been put in place to assign field trips and summer routes in a more equitable and open manner. The contractor has successfully integrated district and contractor employees.

COORDINATED BELL TIMES

The district has instituted staggered bell times that allow each bus to serve two or more schools. This arrangement reduces the number of buses and drivers required resulting in reduced costs.

CAMERAS ON BUSES

The district has established a policy to install cameras on all school buses. These cameras help reduce the number of discipline incidents on the bus, and provide a record of the infraction and students involved for disciplinary action.

DETAILED FINDINGS

BUS DRIVER POSITIONS (REC. 59)

MISD has too many driver positions for the current service level. MISD has 66 driver positions covering 56 routes (48 regular routes and 8 special program routes) with 10 "cover" drivers. In interviews, the general manager indicated the department had hired more drivers than was required due to a smaller number of drivers leaving than anticipated.

Not all drivers report to work every day because of sick days, vacation, or unfilled positions. Additional drivers are needed to cover for absent drivers on these days. Industry standards recommend that 10 percent of a Transportation Department's total drivers act as "cover" drivers.

The number of absences during 2008–09 (September – February) was reviewed to determine how this standard applies to MISD. There were 652 total absences over 113 school days representing an average of 5.8 vacancies per school day. The vacancy rate varied during the school year, with a 1.2 vacancy standard deviation. To provide coverage for 98 percent of the days, 8.2 "cover" drivers are required. This number is calculated by adding two standard deviations to the average number of vacancies (5.8 + 2 x 1.2 = 8.2). For the two percent of the days when more than eight drivers are absent, the office staff are able to provide coverage since all staff have their commercial drivers license. Based upon this absentee analysis, MISD has two more drivers than industry guidelines.

MISD should review the number of driver positions. The district should limit the number of driver positions to one driver per route (56 drivers), plus eight additional drivers to cover for absences and vacancies.

To conform with industry standards, MISD should eliminate two driver positions. The estimated annual savings is projected to be $9,997 per position based upon minimum driver wages, for a total savings $23,392 [$9,997 (salary) + $1,699 (17 percent benefits rate) = $11,696 x 2 (positions) = $23,392].

Additionally, the general manager should implement programs to reduce the daily absentee rate to no more than

10 percent of the drivers. No fiscal impact is assumed regarding this reduction in absenteeism.

ROUTING AND SCHEDULING OPTIMIZATION (REC. 60)

The Transportation Department has not conducted a systematic review of the productivity of its routes, not fully using its computerized routing and scheduling program.

MISD uses the Transfinder electronic routing program to create its routes. The version used by the district is version 7.8. The newer 8.0 version provides expanded optimization capabilities to maximize the efficiencies of the routes. The upgrade is included free of charge as part of their annual maintenance fee. The "optimization" feature of the scheduling package analyzes the location of students, the schools, the roadway network, and limitations on attendance zones and hazardous walking areas. Based upon this input data, the optimizer will develop routes that minimize the mileage, time, or both for the system as a way to minimize the costs and vehicle and personnel requirements. An "optimization" feature is especially critical when new schools are opened or attendance zones are redrawn. In these events, the bus routes must be modified to ensure students are being carried in the most efficient manner to their new schools.

Balancing this mathematical analysis is the skill of the routing coordinator to ensure that exceptions to the rules, such as out-of-district travel, land use around bus stops, and hazardous locations are all taken into account. The current routing coordinator has been in the position for only one and one-half years and has not received formal training on how to maximize the capabilities of the district's electronic routing and scheduling software.

Linear density of bus routes is a measure of the number of regular riders carried per mile of regular bus service over the course of a school year. The linear density for the regular program of the district has fluctuated in recent years, from 1.200 in 2005–06, to 1.096 in 2006–07, to 1.136 in 2007–08. This fluctuation is significant because state funding for transportation is based upon linear density with a funding breakpoint at 1.150. The 2005–06 linear density was in a higher grouping than the following two years (2006–07 and 2007–08).

For the regular program, the state reimburses districts qualifying for transportation expenses based on linear density, which is the ratio of the average number of regular program students transported daily on standard routes to the number of route miles traveled daily for those standard routes.

Standard route miles and riders are a subprogram of the regular program and do not include miles or riders for hazardous, alternative, bilingual, desegregation, magnet, parenting, year-round, or pre-kindergarten service. TEA uses this ratio to assign each school district to one of seven linear density groups. Each group is eligible to receive a maximum per mile allotment. The effect of this approach is to reward districts that are able to carry more riders on fewer miles of service by paying a higher allotment per service mile.

Exhibit 9-1 shows the linear density groups and the related allotment per mile.

Exhibit 9-2 shows the linear densities and the resulting allotment for MISD and a peer group of school districts. Peer districts are school districts similar to Manor ISD that are used for comparison purposes. MISD has a lower linear density than a majority of its peers.

MISD received $0.97 allotment per mile in 2007–08 based on the linear density for 2006–07. Standard regular miles of 445,230 and 504,720 riders during 2007–08 resulted in a linear density of 1.13 (linear density equals standard regular riders [504,720] / standard regular miles [445,230]). This linear density is just below the threshold to enter the next higher reimbursement category. Therefore, the district's reimbursement rate for each eligible regular program route mile for 2008–09 stays the same at $0.97. Route miles eligible for reimbursement do not include extracurricular miles, deadhead miles (deadhead miles occur between the locations where the student transportation vehicle is parked during the day or night and the school where the eligible route miles begin and end), hazardous route miles in excess of the 10 percent limit, or other miles reported to TEA.

EXHIBIT 9-1
LINEAR DENSITY GROUPS

LINEAR DENSITY GROUP	ALLOTMENT PER MILE
2.40 and above	$1.43
1.65 to 2.399	$1.25
1.15 to 1.649	$1.11
0.90 to 1.149	$0.97
0.65 to 0.899	$0.88
0.40 to 0.649	$0.79
Up to 0.399	$0.68

SOURCE: Texas Education Agency, School Transportation Allotment Handbook, May 2008.

EXHIBIT 9-2
MISD AND PEER DISTRICTS
LINEAR DENSITY AND ALLOTMENT PER MILE

DISTRICT	STANDARD REGULAR RIDERS 2007–08*	STANDARD REGULAR MILES 2007–08	LINEAR DENSITY 2007–08	2007–08 ALLOTMENT PER MILE BASED ON 2006–07**	ELIGIBLE ALLOTMENT PER MILE 2008–09**
Mount Pleasant	332,460	258,156	1.288	$1.11	$1.11
Sheldon	397,800	314,917	1.263	$1.11	$1.11
Willis	563,760	515,991	1.093	$0.88	$0.97
Peer Average	431,340	363,021	1.188	---	---
Manor	**504,720**	**445,230**	**1.134**	**$0.97**	**$0.97**

*Annual riders calculated by multiplying average daily riders by 180 school days for all districts per TEA instructions.
**Allotment rates are based on the previous year's linear density.
SOURCE: Texas Education Agency, Transportation Route Services Reports, 2007–08.

The district should obtain training on the district's electronic routing software for the routing coordinator and upgrade the district's routing software to improve routing efficiency. Vendors can provide training on the software operation but often do not provide the training necessary to understand, interpret, and modify the results. Round Rock ISD (RRISD) offers this type of support for users of the electronic routing software used by MISD. RRISD's Transportation Department contracts with many districts across Texas to train their staff on interpreting the results and optimizing the routes. RRISD charges a flat rate of $500 per day for training. Assuming two days are necessary for a district the size of Manor ISD, the total one-time training cost is $1000.

This routing software training coupled with an upgrade to the district's routing software can help improve its routing efficiency, allowing the district to move into a higher linear density group and qualify for a larger per mile funding allotment. Additionally, the district Transportation Department should examine the regular program routing to return the district to the higher linear group.

The increase in linear density that could result from these recommendations would be accomplished by reducing the number of miles operated. Assuming the same number of students are served, if miles were reduced by 6,343 annually, or just 36 miles for each of the 176 school days, the district would move into the higher linear density grouping. The district's current 0.900 – 1.149 linear group has a per mile funding allotment of $0.97 while the higher 1.150 – 1.649 linear group has a per mile funding allotment of $1.11. If the linear density of the district increased to the higher level, the district would have received an additional $84,000 in 2008.

The annual fiscal impact for these recommendations is a savings of $84,000 due to increased funding from a higher linear density grouping, which would increase the cost to the state treasury, and a one-time cost of $1,000 for electronic routing system training.

FLEET MIX (REC. 61)

The MISD fleet is not consistent with ridership levels. The fleet comprises 68 large buses (Type C or D) and no small buses (Type A or B). Smaller buses are more appropriate on routes where the bus load does not exceed 22 passengers. These buses also cost less and consume less fuel.

Exhibit 9-3 shows the fleet inventory by model year.

Large buses have a seating capacity of up to 84 elementary students, assuming three students per seat. Smaller buses can seat around 22 students, but may have a seating capacity of up to 30 students. Of the 48 regular routes, only the MAP route has fewer than 22 students on board, but all of the 8 special education routes have fewer than 22 students. These student loads can be met by using the smaller buses.

The industry standard spare ratio is 10–15 percent of the total fleet, with smaller fleets having a larger percentage spare ratio. These additional buses are needed for each subfleet to provide spares for buses that are inoperable during maintenance or repairs. For MISD's fleet, the spare requirement is seven large buses and one small bus. The total fleet size for MISD, per industry standard of one bus per route plus additional spares, is 54 large buses (47 large route buses + 7 large spare buses = 54 total large buses) and nine small buses (nine small route buses + one spare small bus = total buses 10). This fleet mix requires 14 fewer large buses and 10 additional small buses than MISD's current fleet.

EXHIBIT 9-3
MISD FLEET INVENTORY BY MODEL YEAR

MODEL YEAR	REGULAR (LARGE) BUSES	SPECIAL (SMALL) BUSES
1984	1	0
1985	0	0
1986	0	0
1987	2	0
1988	0	0
1989	1	0
1990	2	0
1991	0	0
1992	4	0
1993	0	0
1994	4	0
1995	3	0
1996	1	0
1997	1	0
1998	5	0
1999	2	0
2000	0	0
2001	7	0
2002	3	0
2003	2	0
2004	4	0
2005	4	0
2006	11	0
2007	6	0
2008	5	0
Total Fleet	**68**	**0**

Source: MISD Transportation Department, December 2008.

Smaller buses are less expensive to purchase than large buses. The cost differential between the two bus sizes is about $23,000, based upon recent bid prices from the Texas Comptroller of Public Accounts. Small buses cost about $57,000 each and large buses cost about $80,000 each. The tradeoff is that smaller buses have a shorter lifespan at 10 years compared to 15 years for large buses. Over a 30-year period, a small bus would need to be replaced three times at a cost of $171,000, (three small buses x $57,000 = $171,000) while a large bus would need to be replaced twice at a cost of $160,000 (two large buses x $80,000 = $160,000). The small bus costs $11,000 more over 30 years.

The smaller buses shorter lifespan is offset by their lower fuel consumption. Based upon a United States Department of Energy study of alternative fuels in school bus fleets, the average small diesel school bus gets 13.3 miles per gallon (mpg), while the larger diesel school buses get 6.6 mpg. The average MISD school bus travels 10,600 miles per year (615,384 miles divided by 58 active buses = 10,610 miles). At the April 17, 2009 price for diesel in the Austin area of $2.171 per gallon, the average large bus costs $3,500 in fuel annually, while the average small bus costs $1,700 annually, a savings of $1,800 annually in fuel costs. Over a 30-year period, the average small bus would save $54,000 in fuel, more than offsetting the $11,000 in purchase costs over that time.

MISD should establish the fleet mix to match the vehicle size to ridership. This result could be accomplished by purchasing additional small buses for use on routes with few riders. The fleet should comprise 10 additional small buses and 14 fewer large buses. To minimize the number of spare parts required, both sized buses should be from the same manufacturer, to the extent possible.

By purchasing 10 more small buses instead of an equal number of large buses, the district will save $230,000 in one-time expenses (10 small buses x $23,000 [cost differential between large and small bus purchases] = $230,000). This purchase cost savings will be phased in over time based upon the bus replacement schedule detailed in the bus replacement plan recommendation.

In addition to these purchase cost savings, the district would realize savings associated with reduced fuel usage for these buses. Based on the recommended bus replacement schedule (see Recommendation 63), the district would purchase 3 small buses instead of three large buses between 2009–10 and 2011–12. This should give the district $5,400 in fuel savings (3 small buses x $1,800 savings in fuel costs per small bus = $5,400). Between 2012–13 and 2013–14 the district would purchase 2 small buses with $3,600 in fuel savings (2 small buses x $1,800 savings in fuel costs per small bus = $3,600) These savings will grow each year as more small buses are added to the fleet. Between 2009–10 through 2013–14, the district would realize a total five-year savings of $374,600.

PROPANE-FUELED BUSES (REC. 62)

MISD has a procurement underway to add six propane-fueled buses to its fleet, but it has not determined if this is a one-time trial or the first step in the full conversion of the

fleet to a new fuel. The district is planning on purchasing six propane-fueled large buses using a grant from Travis County and Texas Commission on Environmental Quality (TCEQ). Propane fueled buses emit lower levels of particulate matter, oxides of nitrogen, and hydrocarbons.

The Petermann Vice President for Operations, who is handling the grant for the district, estimates that the purchase of propane buses under this program will save the district $233,000 over purchasing diesel buses, including the extra expense of installing a fueling station for propane. Propane is estimated to save more than $500 per bus in fueling costs per year when considering the $0.50 per gallon federal rebate.

While these savings can be significant, the district has not adopted a long-term plan to convert its fleet to propane. As discussed in the previous recommendation, the district has a surplus of large school buses and lacks small buses.

Before entering into an arrangement to purchase some alternate-fueled buses, the district needs to make a decision on its overall program. If all diesel buses are to be replaced by propane buses, the district should adopt an explicit replacement plan showing how the buses will be phased in. The district should incorporate into a long-term bus replacement plan an explanation of how propane will be integrated into the fleet and how the fleet mix will change to include small buses. This recommendation can be implemented with existing resources.

BUS REPLACEMENT PLAN (REC. 63)

MISD does not have a bus replacement plan. The district purchases varying numbers of buses from year to year. Since 1990, bus purchases have ranged between a low of zero bus purchases to a high of 11 buses purchased in 2006–07 (see earlier **Exhibit 9-3**).

The National Association of State Directors of Pupil Transportation Services released an issue paper on school bus replacement cycles. According to this paper, studies conducted in the mid-1980's in California and Washington concluded that the annual operating costs of large school buses (known as Type C and D) began to increase significantly after 12 years of use. A 2000 study in South Carolina on Type D school buses concluded that 15 years or 250,000 miles should be adopted as the bus replacement cycle. The paper concluded with a recommendation that school districts adopt a lifespan of 12–15 years for large buses and 8–10 years for small buses.

According to the general manager and maintenance supervisor, MISD has not retired any buses during recent years; only expansion buses have been purchased. As a result, 14 of 68 buses (21 percent of the fleet) are 15 or more years old.

Besides replacing the existing fleet and modifying the mix of school bus types, MISD may need to buy additional vehicles to meet the demands of increasing student enrollment. The district's student enrollment projections include a low-growth projection with a compounded annual growth rate of 5.2 percent and a high-growth projection of 10.2 percent. Based upon this low-growth projection, the district will need to purchase an additional 3–4 large expansion buses and one small bus annually over the next 10 years. Additionally, the district will need to purchase buses to replace those being retired due to age, this will require 3–4 large buses per year (54 buses divided by 15-year lifespan) and one small bus (10 buses divided by 10-year lifespan).

MISD should implement a regular bus procurement schedule that replaces large buses after 15 years and small buses after 10 years. This replacement schedule should be phased in over time to reduce the financial impact in any one year. **Exhibit 9-4** shows the recommended replacement schedule assuming the low-growth projections. For the high-growth projection, the number of bus purchases in each year would be approximately double the amounts shown. The transition to the recommended mix of small and large buses occurs over a five-year period (to 2013) to even out bus purchases from year-to-year. This replacement schedule assumes the planned six large propane buses are purchased during 2009–10.

Once the fleet replacement schedule has been evened out, the purchase of seven large buses (four expansion buses and three replacement buses) and two small buses (one expansion bus plus one replacement bus) per year will require $674,000 annually [7 large buses x $80,000 (cost of a large bus) + 2 small buses x $57,000 (cost of a small bus) = $674,000]. Replacement costs will be mitigated by auctioning off old buses. Recent sales of buses by auction indicates an average bus auction value of approximately $2,600. Based on this figure and factoring in 38 buses scheduled to be retired by 2018 in the recommended bus replacement plan, the district could receive $98,800.

There is no additional fiscal impact because these expenses and savings will be incurred whether or not the plan is adopted because the district must still replace its buses and

EXHIBIT 9-4
RECOMMENDED MISD FLEET PURCHASES BY YEAR (LOW GROWTH)

YEAR	REGULAR (LARGE) BUSES		SPECIAL (SMALL) BUSES	
	PURCHASED	RETIRED	PURCHASED	RETIRED
2009*	6	-8	3	
2010*	5	-4	3	
2011*	5	-4	3	
2012	5	-4	2	
2013	5	-5	2	
2014	6	-2	1	
2015	6	-2	1	
2016	7	-3	1	
2017	7	-3	1	
2018	7	-3	1	

*One of the three small buses purchased in this year reflects implementation of Recommendation 3.
NOTE: Recommended Fleet Purchase based on MISD's Demographic Study 2008 Update.
SOURCE: HDR Engineering, April 2009.

buy expansion buses. The plan simply spreads out the costs and savings evenly over the years.

PREVENTIVE MAINTENANCE INTERVALS (REC. 64)

The Transportation Department uses only one level of preventive maintenance (PM) checks while most manufacturers recommend a graduated program of four or more levels. According to the maintenance supervisor, the district uses a checklist for PM checks at 6,000 or 8,000 miles depending upon the bus model. Industry practice calls for a graduated PM check, with different system checks at 6,000, 12,000, 18,000, and 24,000 miles on average. IC, the manufacturer of most of the district's buses, calls for different PM checks at 5,000, 10,000, 20,000, and 30,000 mile intervals.

The district should revise preventive maintenance practices to incorporate more sophisticated tracking of needed service intervals. The district has a computerized maintenance software package that allows for multiple PM levels and provides advance notice of when a bus is coming due for each.

The potential savings cannot be estimated. By preempting the need for expensive repairs, the district can maintain its fleet in operation for more years.

MECHANIC CERTIFICATION (REC. 65)

MISD does not have an incentive policy for mechanics to increase their skills and receive certifications. Certified mechanics provide more accurate fault diagnosis, which allows more items to be repaired correctly the first time. For mechanics, the appropriate training is offered by the National Institute for Automotive Service Excellence (ASE). ASE offers test series for a variety of vehicles and systems, including automobile, heavy truck, electronics, and other fields. One field of study is for school buses. Seven certifications are offered: 1) body systems and special equipment; 2) diesel engines; 3) drive train; 4) brakes; 5) suspension and steering; 6) electrical/electronic systems; and 7) air conditioning systems and controls. Certification exams are held twice per year. Retesting is required every five years. To be eligible for the test, a mechanic must have two or more years of experience.

MISD should encourage mechanics to become ASE certified and offer a bonus for those mechanics that successfully receive their certification. Training and certification costs are less than $500 per course. A recommended bonus for the successful completion is $300 for each certification. Clear Creek ISD offers an increase in the hourly pay for their mechanics that receive certification. For each certification, up to three, the mechanic receives an increase in pay of $0.15 per hour, or $312 per year per certification.

For three mechanics, assuming each takes all seven training courses and, on average, becomes certified in half the exams (3.5 exams completed) the one-time training cost to MISD

would be $10,500 ($500 per exam x 7 exams x 3 mechanics). If the district were to provide $300 per certification incentive bonuses for each successful certification completion and assuming a 3.5 average passage of the total number of exams by each mechanic, the annual cost to MISD would be $3,150 (3.5 average exams passed x $300 certification incentive x 3 mechanics). The fiscal impact assumes the mechanics take all seven training courses in the first year, resulting in the certification bonuses beginning in 2010–11.

SUPPORT VEHICLE MAINTENANCE (REC. 66)

The Transportation Department does not maintain the "white fleet," the support vehicles of the district. This maintenance is done by the Environmental Services department. Additionally, the review team was told during interviews that MISD does not have a preventive maintenance program for these vehicles. Nearly all of the maintenance vehicles have well over 100,000 miles and many are in need of repair. Currently, the Environmental Services department has a single mechanic whose responsibility is the maintenance of these vehicles, which are housed in the Environmental Services area. The common practice in most districts is to have one department responsible for all vehicle maintenance.

The district should consolidate all vehicle maintenance under the Transportation Department. This department's facility has full service bays that are better suited to servicing the district's support vehicles. Additionally, the Petermann contract includes a provision for the contractor to assume this responsibility. By combining all vehicle maintenance, mechanics can be shared among repairs and a more efficient workforce can be developed.

The district has recognized the age of its current "white fleet" and is purchasing eight new facilities vehicles; a preventive maintenance schedule will help ensure that these new vehicles are properly maintained and can help prolong vehicle life. **Exhibit 9-5** shows a sample vehicle preventive maintenance schedule.

The cost savings cannot be estimated. No objective measure exists to determine the quality of repair and its effect on operations costs.

EXHIBIT 9-5
SAMPLE VEHICLE PREVENTIVE MAINTENANCE SCHEDULE

TYPE OF SERVICE	MILEAGE INSPECTION INTERVALS	SERVICE INTERVALS
Battery	6,000	36–60 months
Engine Tune-Up	12,000	As required
Valve Adjustment	15,000	As required
Emission Service	12,000	12 months
Engine Analysis	NA	12 months
PCV Valve	6,000	12 months
Air Filter	6,000	12–24 months
Oxygen Sensor	3,000	As required
Fuel Injection Cleaning	15,000	As required
Transmission	24,000	As required
Timing Belt	60,000	36–60 months
C-V Joints	6,000	As required
Universal Joints	6,000	As required
C-V Boots	6,000	As required
Headlights	Check Often	As required
Lube and Oil Filter	3,000	3 months
Fuel Filter (Carburetor)	15,000	12–24 months
Breather Filters	6,000	As required
Canister Filters	6,000	As required
Fan/Serpentine Belts	12,000	12–24 months
Air Conditioning Service	15,000	As required

EXHIBIT 9-5 (CONTINUED)
SAMPLE VEHICLE PREVENTIVE MAINTENANCE SCHEDULE

TYPE OF SERVICE	MILEAGE INSPECTION INTERVALS	SERVICE INTERVALS
Cooling System Service	15,000	12–24 months
Cooling System Hoses	15,000	As required
Brakes	6,000	As required
Wheel Bearing Repack/Seals	6,000	12–24 months
Rear Axle Bearing and Seals	24,000	12–24 months
Bearing and Seal Struts	15,000	As required
Tire Rotation	6,000	6 months
Four Wheel Adjustment	6,000	As required
Wiper Blades	6,000	As required
Exhaust Systems	6,000	As required
Shock Absorbers	15,000	As required
Suspension Parts	15,000	As required
Steering Parts	6,000	As required

Source: Developed by Professional Mechanics at Automotive Repair Solutions.

HAZARDOUS SERVICE REPORTING REQUIREMENTS (REC. 67)

MISD does not have a record of the board officially designating the hazardous school bus routes in accordance with TEA regulations. The "Transportation Route Services Report" requires school districts to separately report "two-or-more-mile service" from "hazardous" service. Under TEA funding, the costs of school transportation are eligible for reimbursement only for riders that live two or more miles from their school, unless the walking conditions within the two miles have been declared hazardous by the school board.

Despite the lack of officially board-designated hazardous school bus routes, MISD does claim hazardous route mileage in their transportation route service reports. TEA reimburses school districts at the same rate for these two groups (regular and hazardous services), but the reimbursement for hazardous service does not exceed 10 percent of the amount for two-or-more-mile route service. The TEA *School Transportation Allotment Handbook* states that a school district "must have its board of trustees officially adopt local policy that meets the criteria" and specifically "provides the definition of the hazardous traffic conditions that are applicable to the district and exist within two miles of its campuses, and identifies the specific hazardous areas within the district that contain the hazardous traffic conditions that the board is recognizing. A copy of the policy…shall be submitted to State Funding School Transportation…" The "board policy may be in any written format but must be an official board action."

The transportation general manager, working with the superintendent, should immediately prepare a board action that designates the hazardous routes within the district per the TEA requirements. This recommendation can be implemented with existing resources.

TWO-MILE TRANSPORTATION (REC. 68)

The district has a policy of offering transportation to any student that requests it. This policy provides a high level of service, but requires the district to bear the full cost of transporting students who live within two miles of a school. TEA only reimburses school districts based upon the amount of transportation provided for students who live more than two miles from their school. This amount can be increased by up to 10 percent for students who live in designated hazardous areas within the two-mile distance from school.

Students are unable to easily walk to district campuses. During the facilities tour, the review team observed that many of the district's schools are not easily accessible by students walking to school. MISD facilities are in rural areas and are only accessible by highway or heavily traveled countryroads. These conditions do not make the schools accessible. Furthermore, many of the schools and communities surrounding the schools have very little to no sidewalks for students to walk. After discussion with MISD administrators, they stated that this was a major factor in the district's decision to provide transportation to all MISD students despite the cost.

The district should consider the financial impact of providing transportation to all students. The routing coordinator estimated that four routes that did not present a danger to students walking to school could be eliminated if students within two miles were no longer eligible for service. Assuming an average cost of $48,499 for each of the 48 routes, the district could save approximately $193,996 annually by eliminating four routes ($48,499 x 4 routes). No fiscal impact is assumed, as the district must first review its policy of offering transportation to all students and determine if it should continue to provide this service.

FISCAL IMPACT

	RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
59.	Review the number of driver positions.	$23,392	$23,392	$23,392	$23,392	$23,392	$116,960	$0
60.	Obtain training on the district's electronic routing software for the routing coordinator and upgrade the district's routing software to improve routing efficiency.	$84,000	$84,000	$84,000	$84,000	$84,000	$420,000	($1,000)
61.	Establish the fleet mix to match the vehicle size to ridership.	$74,400	$79,800	$85,200	$65,800	$69,400	$374,600	$0
62.	Incorporate into a long-term bus replacement plan an explanation of how propane will be integrated into the fleet and how the fleet mix will change to include small buses.	$0	$0	$0	$0	$0	$0	$0
63.	Implement a regular bus procurement schedule that replaces large buses after 15 years and small buses after 10 years.	$0	$0	$0	$0	$0	$0	$0
64.	Revise preventive maintenance practices to incorporate more sophisticated tracking of needed service intervals.	$0	$0	$0	$0	$0	$0	$0
65.	Encourage mechanics to become Automotive Service Excellence (ASE) certified and offer a bonus for those mechanics that successfully receive their certification.	$0	($3,150)	($3,150)	($3,150)	($3,150)	($12,600)	($10,500)

FISCAL IMPACT (CONTINUED)

RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
66. Consolidate all vehicle maintenance under the Transportation Department.	$0	$0	$0	$0	$0	$0	$0
67. Prepare a board action that designates the hazardous routes within the district per the TEA requirements.	$0	$0	$0	$0	$0	$0	$0
68. Consider the financial impact of providing transportation to all students.	$0	$0	$0	$0	$0	$0	$0
Totals	**$181,792**	**$184,042**	**$189,442**	**$170,042**	**$173,642**	**$898,960**	**($11,500)**

CHAPTER 10

COMPUTERS AND TECHNOLOGY

MANOR INDEPENDENT SCHOOL DISTRICT

CHAPTER 10. COMPUTERS AND TECHNOLOGY

The Manor Independent School District (MISD) Information Technology Services (ITS) Department supports instructional learning and administrative functions by providing a variety of technology services. The ITS Department develops and maintains computer-based information systems and coordinates instructional and assistive technology programs for the district. The department is headed by a director of Information Technology Services that reports to the assistant superintendent of Administration and Human Resources. The department is organized into five divisions: Network Services, Systems Services, Information Services, Support Services, and Integration Services.

Exhibit 10-1 displays the organization of the MISD Information Technology Services Department.

The Network Services Division is staffed by one employee who is responsible for administering the district's network infrastructure, stability, and security through maintenance and monitoring of the district's local area networks (LANs) and wide area network (WAN) components and accounts.

The major responsibilities of the Systems Services Division include installation, testing, and maintenance of network hardware and software, and administration of operating

EXHIBIT 10-1
MISD INFORMATION TECHNOLOGY SERVICES DEPARTMENT ORGANIZATION 2008–09
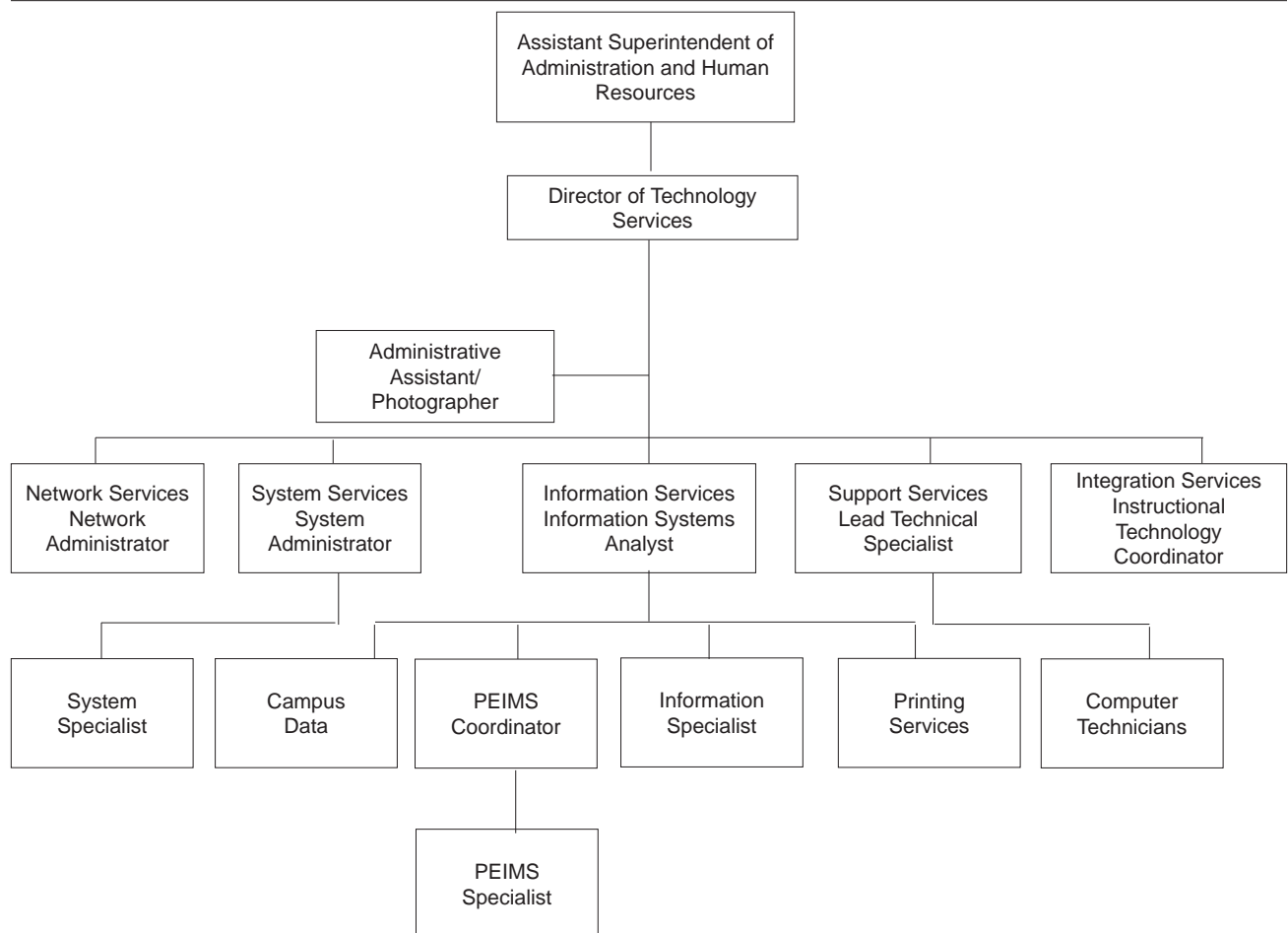
SOURCE: MISD Information Technology Services Department Organization Chart, January 2009.

systems, servers, and Active Directory infrastructure. Two employees support this division.

The Information Services Division is staffed by seven employees who provide implementation and operational support for the district's administrative/business applications including the Student and Business Information Management System. This division also performs collection, data entry, auditing and reporting of Public Education Information Management System (PEIMS) data. This group provides the district's bulk printing and copying services as well.

The Support Services Division is staffed by four employees whose primary responsibility is to provide onsite technical support installing and maintaining computer hardware and software throughout the district.

The Integration Services Division is staffed by the Instructional Technology coordinator, whose responsibilities include: facilitating the effective use of computers and technology in instructional programs districtwide; assisting in the development of short- and long-range plans for the integration of technology into the instructional program; and coordinating and implementing the technology staff development and training program.

MISD's ideal vision for technology comprises the following:
- Administrators and teachers are proficient in technology application skills, software applications, and integration strategies.

- Students master technology application TEKS by the completion of their 8th grade year.

- Seamless integration of technology is a focus and priority on every campus.

- Teachers and administrators attend professional development because they have a desire to improve the technological world of their students.

- Teachers use technology as a tool, versus a glorified worksheet.

- Instructional technology specialists employed on each campus.

- Tech support within 72 hours is available on each campus.

- Technology plans are created and implemented on each campus.

- Teachers and administrators are proficient in technology skills, district standard software applications, and integration strategies.

- Hardware and network upgrades maintained annually.

The mission of the MISD ITS Department is to provide effective teaching and learning experiences for all students and staff members. Ready access to current technology, software tools, and applications will be available to ensure seamless technology integration throughout the district. Rigorous professional development will be provided to ensure that national and state technology proficiencies are maintained. Consistent development of curriculum and instructional strategies, infrastructure, hardware, and dedicated staff members will ensure that all students are guaranteed opportunities for success.

The 2008–09 budget for the ITS Department is approximately $1.48 million or $234 per student as compared to $4.44 million or $761 per student for 2007–08, and $2.25 million or $442 per student for 2006–07. The 2007–08 budget reflects the expenditures required to upgrade the networking and security infrastructure districtwide. **Exhibit 10-2** shows MISD's ITS Department budgets for 2006–07 through 2008–09.

The ITS Department supports approximately 2,700 computers, as well as 50 servers. There are 2,018 computers available for dedicated student access which results in a student-to-computer ratio of 3.14:1. While the district has

EXHIBIT 10-2
MISD ITS DEPARTMENT BUDGETS
2006–07 THROUGH 2008–09

KEY AREA	2006–07	2007–08	2008–09
Salaries/Benefits	$408,770	$556,819	$777,998
Contracted Services	120,873	171,776	215,790
Supplies/Software	807,917	3,637,838	254,855
Other Operating Expenses	14,001	30,216	19,090
Capital Outlay	899,096	38,504	210,000
Total	**$2,250,657**	**$4,435,153**	**$1,477,733**
Number of Students	**5,096**	**5,825**	**6,327**
Average per Student	**$442**	**$761**	**$234**

Source: MISD Information Technology Services Department Budget Reports, 2006–07 through 2008–09.

met the State Board of Education's (SBOE) 1996–2010 Long-Range Plan for Technology recommended student-to-computer ratio of 4:1, which districts were to reach by 2004, there is still work to be done for MISD to reach the 1:1 student-to-computer ratio by 2010, as recommended in the updated 2006–2020 SBOE Long-Range Plan for Technology.

ACCOMPLISHMENTS

- MISD's effective utilization of E-Rate and bond funding has resulted in the implementation of a robust computing and network infrastructure that will adequately support the district's current and future technology needs.

- MISD houses its network and server operations in a state-of-the-art facility.

FINDINGS

- MISD's Long-Range Technology Plan is neither comprehensive nor linked to the District Improvement Plan (DIP).

- MISD lacks a comprehensive professional development program with specific standards and training requirements to ensure that district staff are proficient in the use of technology; additionally, there is no districtwide policy that defines mandatory technology proficiency levels for teachers or timeframes for becoming proficient or integrating technology into the curriculum.

- MISD's ITS Department lacks formal assessment and evaluation measures to gauge and monitor performance and identify areas for improvement as related to cost efficiency, quality of service, and staffing levels.

- MISD lacks an acquisition and inventory policy for instructional and business/operational application assets.

- MISD lacks a comprehensive disaster recovery/business continuity plan that would allow the district to maintain operations in the event the Data Center is rendered inoperable.

RECOMMENDATIONS

- **Recommendation 69: Update the Long-Range Technology Plan for 2008–2011 to include all the**

components necessary to make it a comprehensive and effective management tool.

- **Recommendation 70: Develop a comprehensive professional development program to ensure that district staff are proficient in the use of technology.**

- **Recommendation 71: Establish formal evaluation measures to gauge and monitor performance and identify areas for improvement as related to cost efficiency, quality of service, and staffing levels.**

- **Recommendation 72: Establish an acquisition and inventory policy for instructional and business/operational application assets.**

- **Recommendation 73: Develop and implement a comprehensive disaster recovery/business continuity plan that would allow the district to maintain operations in the event the Data Center is rendered inoperable.**

DETAILED ACCOMPLISHMENTS

COMPUTING AND NETWORK INFRASTRUCTURE

MISD's effective utilization of E-Rate and bond funding has resulted in the implementation of a robust computing and network infrastructure that will adequately support the district's current and future technology needs. MISD actively participates in the E-Rate program governed by the Universal Services Administration Company's School and Library Division to enhance its network and telecommunications infrastructure. Additionally, the district has received support for improving the district's technology from the Manor community through the approval of bond funds dedicated to this purpose. As a result, in recent years the district has been able to implement a computing and networking infrastructure that will support the district's technology needs for years to come. The 2008 E-Rate allotment was $1.9 million, and the 2007 bond funds totaled $4.05 million.

The main features of the enhanced infrastructure include fiber-optic network connectivity for expanded Internet access, wireless access throughout the district, Voice over Internet Protocol (VoIP) telecommunications, and video security at secondary campuses. The district's network was upgraded to a 20MB Internet connection, and each campus has a dedicated private or leased fiber connection. Wireless connectivity is available throughout the district. MISD uses anti-virus software to ensure secure and virus-free access for

desktop and server applications, and the district has email spam and virus protection.

STATE-OF-THE-ART COMPUTING FACILITY

MISD houses its network and server operations in a state-of-the-art facility. In spring 2009, MISD transferred its network operations from a small space in the district's current central administration building to the Data Center, a 1,000 square foot state-of-the-art facility in the new central administration building. E-Rate funds were used for the project. A key feature of the new facility is the diesel generator backup, as frequent power outages are a major problem for the district. The diesel generator provides a reliable and stable power source in the event of a power outage, as it will automatically start when there is an outage, preventing hardware meltdown and an interruption in service. The facility has raised flooring and regulated air condition cooling that will allow it to accommodate varying types of computing hardware. This facility positions the district for years of growth and expansion in technology operations. During the move to this facility, district servers that were previously located at each campus were moved to this facility so that all are housed in a centralized location. However, a server will remain at an offsite location in the district to serve as the tape backup facility for critical data in the event of a disaster.

DETAILED FINDINGS

LONG-RANGE TECHNOLOGY PLAN (REC. 69)

MISD's Long-Range Technology Plan is neither comprehensive nor linked to the District Improvement Plan (DIP). Without a comprehensive technology plan linked to the DIP, the district could be making decisions to spend resources other than where they are needed the most.

MISD has developed a Long-Range Technology Plan for 2008–2011 to accomplish its technology goals. The Technology Plan was developed by the district's Technology Plan Committee, which was comprised of ITS Department staff, teachers, students, and members of the community. This committee met several times to develop the plan during 2007, prior to presenting it for board approval in December 2007. The plan was also approved by the Texas Education Agency in May 2008. The plan focuses on guiding technology decisions by defining goals, objectives, strategies, activities, and timelines, and assigns responsibilities and costs to accomplish each goal. However, none of these goals are linked to the DIP.

Exhibit 10-3 shows MISD's Long-Range Technology Plan for 2008–2011 broken down by goal and objective.

EXHIBIT 10-3
MISD LONG-RANGE TECHNOLOGY PLAN 2008–2011
GOALS AND OBJECTIVES

GOAL	OBJECTIVE
Goal 1 (Teaching and Learning) – Develop mastery of technology proficiency standards to ensure student learning and academic achievement through the transparent integration of technology into instruction and learning across the curriculum.	Objective 1.1 – All students will meet technology proficiency requirements for their grade level based on the Technology Application TEKS.
	Objective 1.2 – Prepare and support students to integrate Technology Application TEKS into core curricula through student projects.
Goal 2 (Educator Preparation and Development) – Increase the capacity of staff members to effectively integrate technology into the core curriculum through mastery of technology literacy proficiency standards and strategies for integration.	Objective 2.1 – All staff members will meet technology proficiency requirements mandated by state and national agencies.
	Objective 2.2 – Prepare and support staff to integrate Technology Application TEKS into core curricula through student projects.
	Objective 2.3 – Provide meaningful and purposeful technology professional development to provide requisite skills to effectively utilize technology integration in classroom instruction.
Goal 3 (Administration and Support Services) –Develop, implement, and support policies and procedures that will standardize current and emerging technologies in an effort to promote equity and provide access for all district stakeholders.	Objective 3.1 – Implement Acquisition and Asset Tracking procedures that will ensure successful implementation of emerging technologies.
	Objective 3.2 – Implement policies and procedures regarding data access, account validation, and proper network use.
	Objective 3.3 – Communicate and educate district stakeholders on legal and ethical issues related to proper technology use.
	Objective 3.4 – Optimize technology use by developing and fostering leadership throughout administration and aligning with major state and federal technology standards.

EXHIBIT 10-3 (CONTINUED)
MISD LONG-RANGE TECHNOLOGY PLAN 2008–2011
GOALS AND OBJECTIVES

GOAL	OBJECTIVE
Goal 4 (Infrastructure for Technology) – Provide a secure, flexible, and resilient infrastructure that will support multiple applications and foster the infusion of technology into daily instruction and district operations.	Objective 4.1 – Build and sustain a robust network infrastructure capable of scaling to meet current and future instructional and operational needs.
	Objective 4.2 – Develop and implement an array of hardware capable of maintaining and expanding secure data systems.
	Objective 4.3 – Research and implement emerging technologies that will enhance and facilitate communication between district stakeholders.
	Objective 4.4 – Address staffing needs through the addition of team members and enhancement of current technical skills.

SOURCE: MISD Long-Range Technology Plan, December 2007.

In order to implement the Long-Range Technology Plan, the district projects expenditures of approximately $4.23 million from 2008 through 2011. The major budget items include staff development, telecommunications and Internet access, materials and supplies, equipment, maintenance, and miscellaneous expenses. The planned funding sources are Title II, Part D Formula, Texas Education Agency (TEA) Technology Allotment, E-Rate, bonds, and local funds. **Exhibit 10-4** summarizes the planned technology expenditures for the three-year period by goal.

EXHIBIT 10-4
MISD LONG-RANGE TECHNOLOGY PLAN
PLANNED EXPENDITURES BY GOAL
2008 THROUGH 2011

GOAL	BUDGET	PERCENT
Infrastructure for Technology	$3,359,061	79.5%
Teaching and Learning	$466,500	11.0%
Educator Preparation and Development	$384,349	9.0%
Administration and Support Services	$15,000	0.4%
TOTAL	**$4,224,910**	**100.0%**

SOURCE: MISD Long-Range Technology Plan, December 2007.

The district has made significant progress towards achieving the goals defined in the Long-Range Technology Plan for 2008–2011. However, analysis of the plan indicates that several technology areas are not adequately addressed within it. While the plan lays out a good roadmap for addressing instructional technology needs, instructional technology applications used throughout the district have not been reviewed by staff for effectiveness. Also, regarding technology integration, the plan does not address how MISD will achieve the state's recommended student-to-computer ratio of 1:1 by 2010, the migration of technology at Manor New Tech High School (MNTHS) to other campuses, or completion of bringing equity to the technology infrastructures of all campuses in the district. Regarding administrative and operational technology needs, several items including upgrade requirements to the primary Student and Business Information System, functionality issues with the curriculum management system—Manor Curriculum Alignment Plans (MCAPS), and upgrade requirements for the Transportation System are not addressed. Additionally, the current system used by the Food Service Department is a web-based, stand-alone vendor-supported system that does not integrate with any of the district's other systems.

While the plan is very definitive in its goals and objectives, none of these are linked to the DIP. For example, Goal 1 of the DIP, "Improve student performance in all core academic areas with an embedded emphasis on math and science" could be facilitated through the use of technology, but no link has been established between the Teaching and Learning goal of the Long-Range Technology Plan and this goal of the DIP.

Comprehensive technology plans include goals, action plans, timelines, performance and success measures, designated personnel responsible for leading the goal and monitoring progress, and financial allocations. Well written technology plans lay the foundation for effective planning and decision-making and guide a district towards achieving its stated goals. They also facilitate budget planning, employee resource allocations, and technology acquisitions. **Exhibit 10-5** provides an overview and comparison of components of a

EXHIBIT 10-5
TECHNOLOGY PLAN COMPONENTS

TECHNOLOGY PLAN COMPONENT	INCLUDED IN MISD'S TECHNOLOGY PLAN
District Profile – includes district statistics such as number of campuses, students, technology budget and the current technology infrastructure	Yes
Executive Summary and background information – includes committee organization and goal	Yes
Needs assessment – the assessment process and outcome of what is needed in the district	Yes
Technology infrastructure goals and standards	Yes
Instructional technology standards, acquisition, and usage	No
Technology literacy and professional development requirements	Yes
Administrative technology standards, acquisition, and usage	No
Technology replacement cycles	Yes
Software standards and acquisition	No

SOURCE: Best practices researched by MJLM as compared to MISD Long-Range Technology Plan, spring 2009.

comprehensive technology plan with MISD's Long-Range Technology Plan.

Boerne ISD's technology plan is comprehensive and details their needs assessment along with explicit goals and timelines for incorporating technology into learning and lesson plans, incorporating student usage of technology tools, professional development, technology competency and literacy requirements, administrative technology, and technology replacement cycles. Galena Park ISD's technology plan includes a comprehensive training program and technology proficiency standards.

MISD should update the Long-Range Technology Plan for 2008–2011 to include all the components necessary to make it a comprehensive and effective management tool. As it stands currently, the district will not have a comprehensive technology plan until it covers all areas of technology need: instructional, administrative, and operational.

The next update to the Long-Range Technology Plan is scheduled for summer 2009. The process of updating the plan should include:

- Expanding the Technology Plan Committee to include representation from the school board, as well as district administration and operation areas, and requiring the committee to meet twice annually to review progress in accomplishing the goals of the plan and update the plan as needed;

- Performing a formal needs assessment of district administrative and operational systems for upgrade or replacement requirements, including those used by the Business, Transportation, and Food Service Departments;

- Reviewing the DIP to determine how technology can support accomplishment of its defined goals and change strategies. For example, Goal 1 of the DIP, "Improve student performance in all core academic areas with an embedded emphasis on math and science," could likely be accomplished with the support of technology;

- Reviewing the infrastructure upgrades required to bring all campuses in the district up to the same level, including what is needed for MISD to achieve the state's recommended student-to-computer ratio of 1:1 by 2010; and

- Reviewing instructional technology applications used throughout the district for effectiveness.

This recommendation can be implemented with existing resources.

TECHNOLOGY PROFESSIONAL DEVELOPMENT AND PROFICIENCY LEVELS (REC. 70)

MISD lacks a comprehensive professional development program with specific standards and training requirements to ensure that district staff are proficient in the use of technology. Additionally, there is no districtwide policy that defines mandatory technology proficiency levels for teachers or timeframes for becoming proficient or integrating technology into the curriculum.

Goal 2 in MISD's Long-Range Technology Plan for 2008–2011 relates to Educator Preparation and Development in that the district is to "Increase the capacity of staff members to effectively integrate technology into the core curriculum through mastery of technology literacy proficiency standards and strategies for integration." More specifically, Goal 2, Objective 2.3 is further delineated, requiring MISD to "Provide meaningful and purposeful technology professional

development to provide requisite skills to effectively utilize technology integration in classroom instruction." **Exhibit 10-6** shows the strategies developed by the Technology Plan Committee to accomplish Goal 2, Objective 2.3 of the Long-Range Technology Plan.

MISD has made great strides in recent years installing a technology infrastructure throughout the district to support integration of technology into the teaching curriculum. The district has installed Internet access to all campuses, installed one or two computer labs equipped with 25 to 30 computers at each campus, implemented wireless technology throughout the district, and made significant progress in providing adequate projectors for teachers' use at each campus. However, for true integration of technology into the teaching curriculum to occur, teachers must be proficient in the use of available technology tools.

A review of the district's Professional Development Plan for 2008–09 reveals several areas of focus, including literacy, math, science, and diversity. However, there was no specific focus in the plan on technology proficiency or integration. Training is a crucial factor in determining whether technology is used effectively. Instructional staff must be comfortable with the use of instructional technology tools in order to effectively integrate technology into their instruction. It is

EXHIBIT 10-6
MISD 2008–2011 TECHNOLOGY PLAN
GOAL 2 - OBJECTIVE 2.3 STRATEGIES

GOAL	OBJECTIVE	STRATEGIES
Goal 2 – (Educator Preparation & Development) – Increase the capacity of staff members to effectively integrate technology into the core curriculum through mastery of technology literacy proficiency standards and strategies for integration.	Objective 2.3 – Provide meaningful and purposeful technology professional development to provide requisite skills to effectively utilize technology integration in classroom instruction.	Strategy 2.3.1 – Develop and implement a technology professional development plan for teachers. Strategy 2.3.2 – Develop and implement a technology professional development plan for administrators. Strategy 2.3.3 – Develop and implement a technology professional development plan for paraprofessionals. Strategy 2.3.4 – Provide professional development for teachers to create, evaluate, share, and deliver technology-infused, learner center projects and successful integration strategies. Strategy 2.3.5 – Promote attendance and supply funding for participation in local, state and national technology conferences and external professional development opportunities for campus technology leaders to increase mentoring capacity. Strategy 2.3.6 – Provide training for all teachers to ensure the successful application of the online databases and encyclopedias provided by the TexShare program. Strategy 2.3.7 – Provide training and support for all teachers in the design of classroom websites and online resources to share lessons and establish virtual communications with parents and students. Strategy 2.3.8 – Research and evaluate potential attainment of Master Technology Teacher Certification for staff members.

SOURCE: MISD Long-Range Technology Plan, December 2007.

critical that the training format for MISD staff includes the use of the Instructional Technology computer labs as well as individual training sessions as appropriate.

The Texas Education Agency developed the Texas School Technology and Readiness (STaR) Chart for use by campuses and districts in conducting self-assessments of their progress of integrating technology into the curriculum in alignment with the goals of the SBOE's Long-Range Plan for Technology, 2006–2020. The key areas of the STaR Chart are Teaching and Learning; Educator Preparation and Development; Leadership, Administration, and Instructional Support; and Infrastructure for Technology. The STaR Chart includes four stages of progress in each of four key areas: Early Tech, Developing Tech, Advanced Tech, and Target Tech. **Exhibit**

10-7 displays the assessment focus areas and scoring within each of the STaR Chart key areas.

Exhibit 10-8 shows a summary of MISD's 2008–09 STaR Chart ratings by campus, with both the rating for level of progress and the actual score provided in each of the four focus areas.

When comparing campus progress in the STaR summary report in the areas of Teaching and Learning and Educator Preparation and Development to the areas of Leadership, Administration, and Instructional Support and Infrastructure for Technology, it is clear to see that far fewer campuses have progressed beyond the Developing Tech status in the former categories when compared to the latter categories. This comparison provides another indicator that MISD staff are

EXHIBIT 10-7
TEXAS CAMPUS STaR CHART FOCUS AREAS AND SCORING

KEY AREA	FOCUS AREAS	SCORES DEPICTING LEVELS OF PROGRESS
Teaching and Learning	• Patterns of classroom use • Frequency/design of instructional setting using digital content • Content area connections • Technology application TEKS implementation • Student mastery of technology applications (TEKS) • Online learning	• Early Tech (6–8) points • Developing Tech (9–14) points • Advanced Tech (15–20) points • Target Tech (21–24) points
Educator Preparation and Development	• Professional development experiences • Models of professional development • Capabilities of educators • Technology professional development participation • Levels of understanding and patterns of use • Capabilities of educators with online learning	• Early Tech (6–8) points • Developing Tech (9–14) points • Advanced Tech (15–20) points • Target Tech (21–24) points
Leadership, Administration, and Instructional Support	• Leadership and vision • Planning • Instructional support • Communication and collaboration • Budget • Leadership and support for online learning	• Early Tech (5–7) points • Developing Tech (8–12) points • Advanced Tech (13–17) points • Target Tech (18–20) points
Infrastructure for Technology	• Students per computers • Internet access connectivity/speed • Other classroom technology • Technical support • Local Area Network/Wide Area Network • Distance Learning Capability	• Early Tech (5–7) points • Developing Tech (8–12) points • Advanced Tech (13–17) points • Target Tech (18–20) points

SOURCE: Texas Education Agency, Campus STaR Chart, spring 2009.

EXHIBIT 10-8
MISD SUMMARY STaR CHART RATINGS BY CAMPUS
2008–09

CAMPUS	TEACHING AND LEARNING	EDUCATOR PREPARATION AND DEVELOPMENT	LEADERSHIP, ADMINISTRATION, AND INSTRUCTIONAL SUPPORT	INFRASTRUCTURE FOR TECHNOLOGY
Blake Manor Elementary	Developing Tech (12)	Developing Tech (12)	Developing Tech (12)	Advanced Tech (17)
Bluebonnet Trail Elementary	Developing Tech (12)	Developing Tech (11)	Advanced Tech (13)	Advanced Tech (14)
Decker Elementary	Developing Tech (12)	Developing Tech (12)	Developing Tech (12)	Advanced Tech (16)
Decker Middle	Developing Tech (14)	Advanced Tech (16)	Advanced Tech (16)	Target Tech (22)
Excel High	Developing Tech (12)	Developing Tech (10)	Advanced Tech (14)	Advanced Tech (15)
Manor Elementary	Advanced Tech (17)	Advanced Tech (17)	Advanced Tech (15)	Target Tech (18)
Manor High	Developing Tech (12)	Developing Tech (12)	Advanced Tech (13)	Advanced Tech (16)
Manor Middle	Developing Tech (12)	Developing Tech (11)	Developing Tech (12)	Advanced Tech (16)
Manor New Tech High	Target Tech (24)	Target Tech (23)	Target Tech (24)	Target Tech (22)
Oak Meadows Elementary	Developing Tech (12)	Developing Tech (12)	Advanced Tech (13)	Advanced Tech (16)
Presidential Meadows Elementary	Developing Tech (14)	Developing Tech (13)	Advanced Tech (15)	Advanced Tech (15)
MISD Average	**DEVELOPING TECH (14)**	**DEVELOPING TECH (14)**	**ADVANCED TECH (14)**	**ADVANCED TECH (17)**
State Average	**Developing Tech**	**Developing Tech**	**Developing Tech**	**Advanced Tech**

SOURCE: MISD Campus Summary STaR Chart Report, 2008–09.

not fully proficient in the use of technology or consistently integrating it into instruction.

However, in comparing the STaR summary report of MISD to state averages, MISD's overall progress in the four key areas falls within the majority of Texas school districts in Teaching and Learning, Developing Tech (14); Educator Preparation and Development, Developing Tech (14); and Infrastructure for Technology, Advanced Tech (17). The district's progress has been greater than that of the state in Leadership, Administration, and Instructional Support, scoring Advanced Tech (14), while the state average is Developing Tech.

MISD should develop a comprehensive professional development program to ensure that district staff are proficient in the use of technology. The program should include specific standards, training requirements, policies,

proficiency standards and goals, and mandatory teacher proficiency levels and timeframes for becoming proficient to ensure all instructional staff attains the capacity to integrate technology effectively into the teaching curriculum. The director of Curriculum and Instruction, director of Professional Development, and the Instructional Technology coordinator should work as a team to develop the technology professional development program. This team should develop training plans, schedules, and formats to ensure teachers receive training within the target timeframe. The team should also develop an evaluation methodology with measures to objectively assess proficiency that includes a certification based on the State Board for Educator Certification (SBEC) Technology Applications Standards. MISD should also consider models from other districts and educational institution best practices in developing its technology professional development program. The district could also

evaluate the feasibility of providing teachers laptops to facilitate the training process through distance learning and online tutorials.

This recommendation can be implemented with existing resources.

TECHNOLOGY EVALUATION MEASURES AND PERFORMANCE STANDARDS (REC. 71)

MISD's ITS Department lacks formal assessment and evaluation measures to gauge and monitor performance and identify areas for improvement as related to cost efficiency, quality of service, and staffing levels.

MISD has implemented a web-based product, Kayako, to report and track technology problems occurring and being worked on by the ITS Department. Being a web-based product, this software provides the capability to report technology problems from anywhere in the district that has Internet access, as well as track the problem through to resolution. At the time of onsite visit in March 2009, ITS Department staff reported that they are still taking numerous phone calls from district personnel related to technology problems, even though the district has purchased and implemented a product for reporting problems through an online system. The department is not tracking the problems reported outside of the online system. According to department staff, only about 10 percent of technology problems are currently being reported through the online system, while the remaining 90 percent of technology problems are being reported as follows: 70 percent are reported by telephone and 20 percent are reported by email. Additionally, when technology problems are reported outside of the online system, they must be manually prioritized and distributed by department staff. Problems that are reported online can be prioritized and distributed automatically by the system. Interviews with department staff indicate the workload for technical support may not be appropriately distributed.

The district's incomplete use of its system to report technology problems has resulted in a lack of available information for use in identifying and evaluating areas for improvement. Effective evaluation measures include measurable goals and objectives, performance indicators, quality measures, and benchmarks or standards for comparison purposes. **Exhibit 10-9** shows examples of technology performance metrics categorized by cost, quality, support, and integration.

EXHIBIT 10-9
TECHNOLOGY PERFORMANCE METRIC EXAMPLES BY CATEGORY

CATEGORY	PERFORMANCE METRICS
Cost	Technology expenditures per student
	Telephone cost per district employee
	Average repair cost per computer/server
	Network infrastructure cost per student
Quality	Network/system availability
	Reliability, Accessibility, Stability (RAS)
	Workstation response time
	Network up-time (monthly average)
	Average time to resolve trouble tickets
Support	Help desk response time
	Computer-to-technician ratio (target level is 350:1)
	Number of campus-based technical liaisons
	Computer-to-student ratio (target level is 1:1)
Integration	Number of teachers with technology certification
	Number of classrooms with projectors, TV monitors, and other multi-media equipment
	Ratio of number of hours for instructional technology training to number of teachers

SOURCE: MJLM Performance Metrics, April 2009.

MISD should establish formal evaluation measures to gauge and monitor performance and identify areas for improvement as related to cost efficiency, quality of service, and staffing levels. In order to obtain accurate data for evaluation, MISD should first establish and enforce a policy that all technology problems and trouble calls must be reported through the district's online tracking system by the affected party. For the exceptions that are received via telephone or email, the technology staff should enter them into the system in a timely manner. Once all district users are reporting technology problems through the online system, the ITS Department can use the data from the system to establish performance standards and measure support performance, including the development of a set of metrics to track trends and compare the district's technology function against the established benchmarks.

Additionally, the ITS Department should develop a survey to receive feedback from key users. Measuring the performance

of the daily operations of the ITS Department will help identify opportunities for improvement and assist in determining appropriate staffing levels. Support performance data could help the department better allocate the workload for the technical staff or provide justification for additional staff. The ITS Department's performance should be reported on a regular basis to the school board, superintendent, and district staff. This recommendation can be implemented with existing resources.

ACQUISITION AND INVENTORY POLICY FOR TECHNOLOGY ASSETS (REC. 72)

MISD lacks an acquisition and inventory policy for instructional and business/operational application assets. Lack of such a policy has resulted in an inaccurate inventory count and lack of accountability of both software and hardware in MISD. Currently, software purchases occur across the district without knowledge of or approval by the ITS Department. This practice could lead to possible software license problems, potential conflict with pre-image hardware and software, and no leverage of volume purchases.

The district has established a 5+1 (6-year) replacement policy for computers, a strategy which has major cost and effective support implications. An accurate inventory and location of the district's computers are key components to a successful replacement strategy. Currently, MISD does not conduct a manual physical inventory of district hardware, nor does it have a sign-out process for employees who have district hardware assigned to them. Without an accurate inventory and effective inventory process, the district may not have the technology that it needs for education and operations and may spend resources in areas that do not contribute to educational or operational needs.

One of the major responsibilities of the MISD ITS Department is to acquire, manage, and track the technology assets of the district, which includes hardware and software. MISD has instituted a policy that all technology hardware purchases are processed through the ITS Department, which has allowed the district to standardize hardware and reduce costs by utilizing volume purchases. **Exhibit 10-10** displays MISD's hardware and associated software standards for 2008–09.

In March 2009, MISD engaged a property inventory consultant to inventory and barcode hardware valued greater than $400 at all locations within the district. The firm completed the inventory at all locations except the district's transportation facilities and central administration building.

EXHIBIT 10-10
MISD HARDWARE AND ASSOCIATED SOFTWARE STANDARDS
2008–09

HARDWARE	ASSOCIATED SOFTWARE	
Dell Latitude E-Series	Windows XP Professional Microsoft Office 2003	Windows Media Player Real Player
Apple MacBooks	Internet Explorer 7.0 Adobe Acrobat Reader Adobe Flash Ultra-VNC Java Adobe Shockwave Power DVD	QuickTime Photostory 3 7-Zip Roxio Creator Audacity Sophos Anti-virus

SOURCE: MISD Information Technology Services Department, spring 2009.

MISD conducts inventory of software on machines using an open source software product which remotely checks the software on each machine and reports it by service tag number.

MISD should establish an acquisition and inventory policy for instructional and business/operational application assets. Regarding software acquisition, the policy should ensure that the ITS Department is involved in the evaluation, selection, and purchasing process. Data obtained through the periodic remote software inventory should be used to validate license agreements and determine whether non-approved software is loaded on the district's computers. Regarding hardware inventory, the policy should create a process for ongoing update of the hardware inventory with a complete physical inventory being conducted annually. Associated with each piece of hardware should be a district employee that is responsible and accountable for its safekeeping. The process should include a formal sign-out when the hardware is issued to an employee and sign-in when the employee no longer needs the hardware or leaves the district.

MISD is moving its central office to a new facility. Immediately following this move, the district should complete the inventory and barcoding of the hardware at this facility, as well as at the transportation facilities. The fiscal impact to the district to implement this recommendation is a one-time cost of $600, which constitutes paying a property inventory consultant $100 per hour for the six hours required to complete the hardware inventory and barcoding. As the district has already purchased the labels for the hardware that has yet to be barcoded and inventoried, there is no cost for the labels.

DISASTER RECOVERY/BUSINESS CONTINUITY PLAN (REC. 73)

MISD does not have a comprehensive disaster recovery/ business continuity plan that would allow the district to maintain operations in the event the Data Center is rendered inoperable. Without a comprehensive disaster recovery plan, the district is at risk of losing critical data and operations in the event of an unforeseen disaster.

The district's new computing facility, the Data Center, has a diesel generator which provides a reliable and stable power source in the event of a power outage. MISD uses proprietary software to back up data on a server at an offsite location in the district in case the servers in the Data Center encounter problems. This backup occurs automatically on a weekly, monthly, and annual basis and is stored on the server. There is no out-of-district or web-based storage location for the backup data. Additionally, there is no backup network coming into the main hub which could provide another route for network traffic to the facility should the main route be compromised.

The primary objective of a disaster recovery/business continuity plan is to protect the district in the event its operations and technology services become unusable. Prior planning and test exercises minimize chaos and ensures a level of organizational stability and orderly recovery after a disaster.

According to the National Center for Education Statistics report *Safeguarding Your Technology*, the essential elements in a formal disaster recovery plan include:

- Develop a complete list of critical activities performed within the district;

- Identify which systems and staff are necessary to perform functions;

- List key personnel for each function, and their responsibilities;

- Create an inventory of all technology assets including hardware, software systems and data, documentation, and supplies that correctly identify the location and sufficient information to document loss for insurance recovery;

- Define actions to be taken when a pending disaster is projected;

- Identify actions taken to restore critical functions;

- Keep the plan simple but effective; and

- Keep the plan components in an accessible location that can be accessed in the event of an emergency.

MISD should develop and implement a comprehensive disaster recovery/business continuity plan that would allow the district to maintain operations in the event the Data Center is rendered inoperable. The plan would identify critical systems and data that must be protected and would help the district restore operations and technology services in an orderly manner as soon as possible after a crisis occurs.

As part of the development process, the district should:

- Establish a disaster recovery planning team including representatives from all functional areas of the district;

- Perform a risk analysis of possible disasters, including natural, technical, and human threats and determine the potential consequences and effects associated with each scenario;

- Establish priorities for processing and operations, including key personnel, information systems, maintenance, documentation, vital records, and policies and procedures;

- Determine viable and practical alternatives for processing in case of a disaster, including facilities, software, communications, data files, customer service, and user facilities;

- Gather materials and documentation to include key telephone numbers, hardware and software inventories, insurance policies, master call lists, master vendor list and lease agreements, and data file backup and retention schedules;

- Organize and document a written plan providing detailed documentation and procedures to include methods to maintain and update the plan to reflect any significant internal, external, or system changes;

- Develop testing criteria and provide training to district staff, and demonstrate the district's ability to recover; and

- Test the plan to include use of checklists, simulation tests, parallel tests, and full-interruption tests.

The district's disaster recovery team should conduct an annual review of the plan to ensure that changes in staff, organization, or systems are incorporated in the plan.

As part of the development of the disaster recovery/business continuity plan, MISD should consider exploring alternatives for use as a backup facility for key application processing and network connectivity if the core network center is inoperable for an extended period of time. Many districts use the vendor which provides the software for them to back up their system, or their regional education service center, to serve as a backup computing facility or to provide redundant network capability in case of a problem or disaster. This recommendation can be implemented with existing resources.

FISCAL IMPACT

RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
69. Update the Long-Range Technology Plan for 2008–2011 to include all the components necessary to make it a comprehensive and effective management tool.	$0	$0	$0	$0	$0	$0	$0
70. Develop a comprehensive professional development program to ensure that district staff are proficient in the use of technology.	$0	$0	$0	$0	$0	$0	$0
71. Establish formal evaluation measures to gauge and monitor performance and identify areas for improvement as related to cost efficiency, quality of service, and staffing levels.	$0	$0	$0	$0	$0	$0	$0
72. Establish an acquisition and inventory policy for instructional and business/ operational application assets.	$0	$0	$0	$0	$0	$0	($600)
73. Develop and implement a comprehensive disaster recovery/business continuity plan that would allow the district to maintain operations in the event the Data Center is rendered inoperable.	$0	$0	$0	$0	$0	$0	$0
Totals	**$0**	**$0**	**$0**	**$0**	**$0**	**$0**	**($600)**

CHAPTER 11

SAFETY AND SECURITY

MANOR INDEPENDENT SCHOOL DISTRICT

CHAPTER 11. SAFETY AND SECURITY

A primary objective for school districts is to provide a safe and secure learning environment for students and an accident-free environment for employees and visitors. To provide such an environment, safety and security programs must be interactive and include elements of prevention, intervention, and enforcement. Well-managed school districts develop policies, procedures, and programs to address crisis contingencies, student discipline, facility safety, and violence prevention. Additionally, well-managed school districts often leverage community resources and cooperate with municipal and county governments to enhance prevention, intervention, and enforcement initiatives critical to maintaining a safe and secure learning environment.

Under the provisions of the Texas Education Code, each Texas school district is required to adopt a student code of conduct that outlines the standards of behavior, categorized by level of offense. The code also outlines related disciplinary consequences, ranging from student-teacher conferences for minor offenses, to suspension or placement in an alternative education program (AEP) for more serious offenses.

While no formal security force is in place, Manor Independent School District (MISD) has entered into an interlocal agreement with the Travis County Sheriff's Department to provide four full-time school resource officers (SROs) to the district: two officers assigned to Manor High School, one officer assigned to Manor Middle School, and one officer assigned to Decker Middle School. While the deputy superintendent for Operations administers the SRO contract,

the SROs operationally report to the principals of the respective schools where they work.

Exhibit 11-1 shows the current organizational chart for MISD's school resource officers.

MISD is also statutorily obligated to create a comprehensive Emergency Operations Plan that provides the foundation for addressing crisis contingencies. The plan describes MISD's emergency response organization and delineates the roles and responsibilities for specific employees in the event of an emergency. Additionally, the district publishes and distributes an Emergency Procedures Quick Reference Guide to principals, staff, and administrators as a desk reference in case of emergency. The Emergency Procedures Quick Reference Guide summarizes pertinent contact information for the Emergency Operations Plan and provides abbreviated instructions on how to respond to specific emergencies.

ACCOMPLISHMENTS

- MISD implemented an electronic visitor registration system to record, track, and monitor visitors to school campuses throughout the district.

- MISD's safety representative regularly attends training provided by the Central Texas Safety Consortium to keep abreast of safety and security issues encountered throughout central Texas.

- MISD was able to execute its emergency operations plan during September 2008 when the City of

EXHIBIT 11-1
MISD SCHOOL RESOURCE OFFICER PROGRAM ORGANIZATION
2008–09
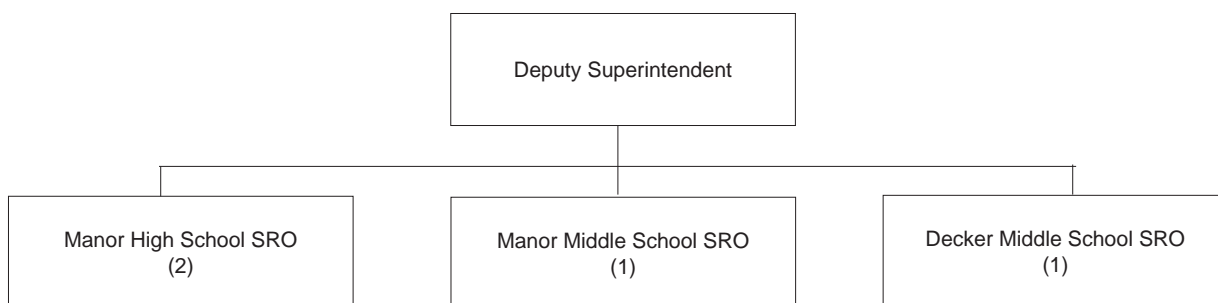
Source: MISD Deputy Superintendent, March 2009.

Houston and the Harris County area evacuated for Hurricane Ike.

FINDINGS

- MISD has not ensured a safe and secure learning environment for staff and students at the Excel/MAP campus.

- MISD's discipline management program facilitates a large number of disciplinary actions, and Code of Conduct violation referrals to the MAP campus are not consistent because of the district's "no tolerance policy."

- MISD is experiencing an increasing perception of gang violence, drug use, and vandalism throughout the district.

RECOMMENDATIONS

- **Recommendation 74: Ensure a safe and secure learning environment for staff and students at the Excel/MAP campus.**

- **Recommendation 75: Conduct a comprehensive evaluation of the district's Code of Conduct with a specific focus on the "no tolerance policy" to ensure that disciplinary actions are consistent by incident and that referrals to the Excel/MAP campus are appropriate responses to the incidents that occurred.**

- **Recommendation 76: Increase gang and drug awareness and vandalism deterrence efforts.**

DETAILED ACCOMPLISHMENTS

ELECTRONIC VISITOR REGISTRATION SYSTEM

MISD implemented an electronic visitor registration system (Raptor) to record, track, and monitor visitors to school campuses throughout the district. According to the Visitor Management Procedural Guide, the visitor registration system enhances school security by reading visitor drivers' licenses, comparing information to a sex offender database consisting of sex offenders from 48 states, including Texas. If a match is confirmed, campus administrators and law enforcement personnel are contacted to take appropriate steps to ensure the campus remains safe, otherwise a visitor badge is printed that includes a photo, the visitor's name, time and date.

The Visitor Management Procedural Guide also requires every campus visitor be scanned into the visitor registration system, including parents, volunteers, social service workers, MISD Board Members, invited speakers, maintenance and repair persons not employed by MISD, vendors, media personnel, substitute teachers, former students, and any other visitor.

Moreover, MISD employees who do not have an available employee badge are required to be scanned into the system and wear the printed badge. Employees with a MISD badge can sign the visitor log and enter the campus.

REGULAR TRAINING THROUGH CENTRAL TEXAS SAFETY CONSORTIUM

MISD's safety representative regularly attends training provided by the Central Texas Safety Consortium to keep abreast of safety and security issues encountered throughout central Texas. This organization partners approximately 20 central Texas school districts who meet on a quarterly basis to discuss and share school safety best practices relevant to today's challenges.

School administrators attend gang awareness courses every summer held by the Travis County Sheriff's Department's Gang Task Force. By attending these continuous education programs, district administrators and personnel stay abreast of school safety and security issues throughout central Texas. As a result of regularly attending the Central Texas Safety Consortium training programs, the safety representative is informed of the latest security threats to Texas school campuses. The meetings have also helped the district safety representative improve the district's Emergency Procedures Quick Reference Guide and the MISD Bomb Threat Documentation Sheet. The Bomb Threat Documentation Sheet documents important information from callers initiating bomb threats as follows:

- Caller's gender;

- Exact language/wording used by the caller;

- Caller's attitude;

- Speech patterns (such as slow, raspy, fast, rambling); and

- Background noises.

The Bomb Threat Documentation Sheet also provides a guideline for school personnel who receive bomb threats from callers. The sheet provides school personnel with questions to ask the caller, including:

- What time is the bomb set for?

- Where is it located?

- What does it look like?

- What will cause it to detonate?

- Who is the intended target?

- Why are they the intended target?

- What is your name?

HURRICANE IKE EVACUATION SHELTER

MISD was able to execute its emergency operations plan during September 2008 when the City of Houston and the Harris County area evacuated for Hurricane Ike. The district is a member of the Capital Area Shelter Hub that opens schools to serve as temporary shelters. As thousands of Houston and Harris County residents evacuated to the Austin, Texas area, the district provided temporary shelter and mass care operations in MISD facilities to Hurricane Ike evacuees.

DETAILED FINDINGS

ALTERNATIVE EDUCATION PROGRAM LEARNING ENVIRONMENT (REC. 74)

MISD has not ensured a safe and secure learning environment for staff and students at the Excel/MAP campus. Due to the nature of offenses required to send middle and high school students to the MAP campus, elementary students co-locate in the alternative education setting with older students who could have more serious discipline problems such as violent behavior and drug and alcohol possession. This situation creates a potential safety issue, as the younger students are on campus with older students and both use many common facilities such as restrooms. The opportunities for co-mingling in these common areas also creates an environment that could potentially expose younger students to mature language and disciplinary issues that more commonly occur between middle and high school students in an alternative education setting.

Additionally, interviews by the review team indicated that the MAP lacks working security cameras or a School Resource Officer (SRO) on campus. During review team interviews, staff mentioned previous physical confrontations between students and staff members. To compensate for the lack of a security presence on campus, two staff are assigned to each MAP classroom to separate students with minor offenses from students with more serious offenses, and to work with the students.

The district should ensure a safe and secure learning environment for staff and students at the Excel/MAP campus. The district should address the MAP's security concerns by creating separate alternative education environments for elementary students and middle school and high school students. This adjustment should eliminate the exposure of elementary students to behavioral issues more common to mature middle and high school students in a disciplinary environment. The district should evaluate creating alternative educational programs on students' home campuses, rather than sending students to MAP.

The district could also add an SRO to the Excel/MAP to address security concerns at the campus. The cost to hire a full-time SRO is $71,273 annually. This cost is based on costs to the district for each SRO as part of a contract with Travis County to provide security services. This cost includes salary, benefits, indirect personnel costs, supplies, vehicle and corresponding vehicle maintenance.

ALTERNATIVE EDUCATION PROGRAM DISCIPLINARY ACTIONS (REC. 75)

MISD's discipline management program facilitates a large number of disciplinary actions, and Code of Conduct violation referrals to the MAP campus are not consistent because of the district's "no tolerance policy." MISD's Student Handbook/Code of Conduct outlines standards for student behavior, offenses are categorized by type and severity with corresponding disciplinary consequences, ranging from student-teacher conferences for minor offenses to suspension or placement in a Discipline Alternative Education Program (DAEP) for more serious offenses.

Congress passed the Gun Free Schools Act in 1994 that requires states that received federal funds to mandate at least one-year expulsion for any student who brought a gun to school. In response, state legislatures and local districts enacted zero-tolerance discipline policies requiring or allowing students to be removed from schools for gun possession, distribution, or use of alcohol or drugs; physical attacks or fights; chronic truancy; possession or use of weapons other than firearms, and disruptive verbal behavior.

It appears that MISD has enthusiastically adopted this zero-tolerance approach to disciplining the district's students. The zero-tolerance policy may contribute to increased referrals to MAP for Code of Conduct violations, thereby creating an

environment where teachers and principals refer elementary aged students to MAP for Code of Conduct violations for incidents across a wider range of severity than middle or high school students, many of which could be addressed at the students' home campuses. For example, the interim MAP principal told members of the review team that the majority of elementary school students referred to MAP are third grade through fifth grade students. These students were referred to MAP because of disciplinary action to address persistent classroom misbehavior and for "talking back" to teachers, with some isolated incidents in which elementary students were referred to the alternative education setting for bringing a knife or BB gun to school.

Exhibit 11-2 provides MISD incident statistics for 2006–07 through 2007–08. The 2007–08 incident statistics included a new campus since this was the first operational year for Presidential Meadows Elementary School.

EXHIBIT 11-2
MISD INCIDENT STATISTICS
2006–07 THROUGH 2007–08

INCIDENT	2006–07	2007–08*	PERCENT INCREASE (DECREASE) 2006–2007 THROUGH 2007–08
Permanent removal by teacher	42	**	—
Possession of a controlled substance	12	11	(8%)
Violation of Code of Conduct while in AEP	70	155	121%
Violation of Code of Conduct	3,012	3,106	3%
Terroristic Threat	3	0	(300%)
Assault on a non-employee/volunteer	7	**	—
Cigarette/tobacco	4	5	25%
Fighting/mutual combat	77	54	(30%)
Felony Possession of a Controlled Substance	0	**	—
Assault against an employee/volunteer	2	0	(200%)
Totals	**3,229**	**3,338**	**3%**

*Includes Presidential Meadows Elementary School incident data.
**Numbers less than five have not been cited due to the Family Educational Rights and Privacy Act (FERPA) 34CFR Part 99.1 and Texas Education Agency procedures OP 10-03.
SOURCE: MISD Student Disciplinary Action Summary.

Overall, MISD's incident statistics increased by 3 percent from 2006–07 to 2007–08. Several types of incidents contributed to the increase in disciplinary actions from 2006–07 to 2007–08. These incidents included Code of Conduct violations, Cigarette/Tobacco Use or Possession, and Felony of a Controlled Substance.

MISD should conduct a comprehensive evaluation of the district's Code of Conduct with a specific focus on the "no tolerance policy" to ensure that disciplinary actions are consistent by incident and that referrals to the Excel/MAP campus are appropriate responses to the incidents that occurred. Additionally, the district should review the Code of Conduct to determine if definitions of and responses to persistent behavioral problems are clearly defined and create guidelines for administrators and teachers to follow prior to sending students to MAP. This recommendation can be implemented with existing resources.

PERCEPTIONS OF GANG VIOLENCE, DRUG USE, AND VANDALISM (REC. 76)

MISD is experiencing an increasing perception of gang violence, drug use, and vandalism throughout the district. According to survey results, principals and assistant principals, teachers, and administrative staff believe gangs, drugs, and vandalism are problems within the district. District personnel indicated in interviews that vandalism on school property has recently increased. The deputy superintendent stated that every summer administrators attend gang awareness training conducted by the Travis County Sheriff's Department and the Austin Police Department.

Exhibit 11-3 shows MISD staff survey results obtained by the review team concerning perceptions of gangs, drugs, and vandalism in the district. Overall, the administrative support staff believes that gangs and gang activity are a problem. Forty-two (42) percent of the administrative staff believe that gangs are a problem with MISD, while only 21 percent are of the opinion that gangs are not a problem within the district. The survey revealed that 63 percent of responding teachers feel that gangs are a problem for MISD, while 62 percent feel that drug possession and use is a problem for MISD campuses.

The San Antonio Police Department's Youth Crime Service Unit states that a gang is a group of people who form an alliance for a common purpose and engage in violent or criminal activity. The average age of gang members is from fourteen to twenty-one years of ages; however, members can be as young as eight years old.

EXHIBIT 11-3
PRINCIPALS, ASSISTANT PRINCIPALS, TEACHERS AND ADMINISTRATIVE SUPPORT SURVEY RESULTS

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
PRINCIPAL AND ASSISTANT PRINCIPAL SURVEY					
Gangs are not a problem in this district.	4%	33%	29%	34%	0%
Drugs are not a problem in this district.	4%	21%	29%	42%	4%
Vandalism is not a problem in this district.	4%	42%	33%	21%	0%
TEACHER SURVEY					
Gangs are not a problem in this district.	3%	15%	19%	43%	20%
Drugs are not a problem in this district.	2%	12%	24%	37%	25%
Vandalism is not a problem in this district.	3%	18%	19%	38%	22%
ADMINISTRATIVE SUPPORT STAFF SURVEY					
Gangs are not a problem in this district.	6%	15%	37%	28%	14%
Drugs are not a problem in this district.	3%	14%	36%	32%	15%
Vandalism is not a problem in this district.	4%	16%	38%	27%	15%

NOTE: Percentages may not add to 100% due to rounding.
SOURCE: Surveys conducted by MJLM, March 2009.

There are several behavioral signs attributed to gang membership, including:

- major negative behavior;
- hand signs;
- carrying weapons;
- gang graffiti;
- gang clothing;
- gang tattoos; and
- unexplained fairly large sums of money.

According to the National Institute of Justice's Urban Institute, the majority of vandalism occurs after school hours and can include:

- graffiti;
- trash dumping;
- light smashing;
- removing and bending signage or ornamentation;
- breaking windows; or
- other defacing of property.

Vandalism is not senseless property damage. Individuals vandalize for a variety of reasons including:

- to convey a message;
- to express frustration;
- to stake revenge;
- to make money; or
- as part of a game.

The district should increase gang and drug awareness and vandalism deterrence efforts. To address perceptions of gang violence and drug use, MISD should continue efforts in educating administrators concerning gang and drug prevention and awareness efforts. Additionally, the district should evaluate expanding gang and drug awareness training to teachers and students. Continued awareness should help promote detection before these problems can develop.

To address vandalism, MISD should evaluate their vandalism problem and identify any practices that may make MISD campuses vulnerable to vandalism. After measuring the level of vandalism, MISD should collaborate with the Travis County Sheriff's Department and the City of Manor Police Department to increase patrols of campuses during off hours as a deterrent to vandalism.

Possible solutions for vandalism include:

- increasing police or security presence for hours immediately following school dismissal;
- putting lights out of reach or behind protective covering;

- using strengthened, scratch resistant glass or window grilles;

- detecting and repairing damage quickly;

- improving lighting;

- increasing incident reporting to police;

- developing business/neighborhood watch programs;

- establishing a list of chronic vandals; and

- installing video surveillance in problematic locations.

This recommendation can be implemented with existing resources.

FISCAL IMPACT

RECOMMENDATION	2009–10	2010–11	2011–12	2012–13	2013–14	TOTAL 5-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
74. Ensure a safe and secure learning environment for staff and students at the Excel/ MAP campus.	($71,273)	($71,273)	($71,273)	($71,273)	($71,273)	($356,365)	$0
75. Conduct a comprehensive evaluation of the district's Code of Conduct with a specific focus on the "no tolerance policy" to ensure that disciplinary actions are consistent by incident and that referrals to the Excel/MAP campus are appropriate responses to the incidents that occurred.	$0	$0	$0	$0	$0	$0	$0
76. Increase gang and drug awareness and vandalism deterrence efforts.	$0	$0	$0	$0	$0	$0	$0
Totals	**($71,273)**	**($71,273)**	**($71,273)**	**($71,273)**	**($71,273)**	**($356,365)**	**$0**

APPENDICES

MANOR INDEPENDENT SCHOOL DISTRICT

DISTRICT ADMINISTRATIVE AND SUPPORT STAFF SURVEY

(Total Number of Respondents = 198)

PART A. DEMOGRAPHIC DATA

NOTE: Totals may not equal 100 percent due to rounding.

1.	GENDER (OPTIONAL)	MALE	FEMALE
		24%	76%

2.	ETHNICITY (OPTIONAL)	ANGLO	AFRICAN AMERICAN	HISPANIC	ASIAN	OTHER
		40%	13%	43%	1%	3%

3.	HOW LONG HAVE YOU BEEN EMPLOYED BY MANOR ISD?	LESS THAN 1 YEAR	1–5 YEARS	6–10 YEARS	11–15 YEARS	16–20 YEARS	20+ YEARS
		16%	50%	14%	15%	2%	3%

4.	ARE YOU A(N):		
	ADMINISTRATOR	CLERICAL STAFF	SUPPORT STAFF
	17%	16%	67%

5.	HOW LONG HAVE YOU BEEN EMPLOYED IN THIS CAPACITY BY MANOR ISD?	LESS THAN 1 YEAR	1–5 YEARS	6–10 YEARS	11–15 YEARS	16–20 YEARS	20+ YEARS
		18%	49%	14%	14%	2%	3%

PART B. SURVEY QUESTIONS

A. DISTRICT ORGANIZATION AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
1. The school board allows sufficient time for public input at meetings.	12%	28%	48%	8%	4%
2. School board members listen to the opinions and desires of others.	10%	27%	50%	9%	4%
3. The superintendent is a respected and effective instructional leader.	21%	30%	40%	5%	4%
4. The superintendent is a respected and effective business manager.	17%	33%	42%	5%	3%
5. Central administration is efficient.	13%	36%	30%	17%	4%
6. Central administration supports the educational process.	19%	38%	34%	7%	2%
7. The morale of central administration staff is good.	14%	34%	39%	10%	3%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
8. Education is the main priority in our school district.	32%	36%	21%	9%	2%
9. Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	12%	32%	45%	10%	1%
10. The needs of the college-bound student are being met.	6%	25%	56%	10%	3%
11. The needs of the work-bound student are being met.	4%	27%	61%	7%	1%
12. The district has effective educational programs for the following:					
a) Reading	14%	37%	42%	6%	1%
b) Writing	11%	38%	44%	6%	1%
c) Mathematics	11%	42%	41%	3%	3%
d) Science	11%	39%	42%	7%	1%
e) English or Language Arts	11%	42%	42%	4%	1%
f) Computer Instruction	14%	36%	44%	4%	2%
g) Social Studies (history or geography)	13%	35%	44%	6%	2%
h) Fine Arts	13%	34%	48%	3%	2%
i) Physical Education	13%	36%	45%	4%	2%
j) Business Education	7%	26%	62%	4%	1%
k) Vocational (Career and Technology) Education	7%	27%	62%	3%	1%
l) Foreign Language	6%	26%	63%	3%	2%
13. The district has effective special programs for the following:					
a) Library Service	13%	32%	47%	7%	1%
b) Honors/Gifted and Talented Education	12%	38%	45%	5%	0%
c) Special Education	17%	34%	41%	7%	1%
d) Head Start and Even Start programs	11%	30%	55%	4%	0%
e) Dyslexia program	7%	26%	58%	8%	1%
f) Student mentoring program	15%	36%	44%	4%	1%
g) Advanced placement program	9%	30%	59%	1%	1%
h) Literacy program	9%	34%	52%	5%	0%
i) Programs for students at risk of dropping out of school	9%	28%	51%	10%	2%
j) Summer school programs	11%	35%	43%	9%	2%
k) Alternative education programs	9%	31%	49%	9%	2%
l) "English as a second language" program	11%	37%	42%	8%	2%
m) Career counseling program	8%	25%	60%	5%	2%
n) College counseling program	6%	28%	59%	4%	3%
o) Counseling the parents of students	6%	20%	60%	11%	3%
14. Parents are immediately notified if a child is absent from school.	4%	21%	53%	15%	7%
15. Teacher turnover is low.	3%	16%	43%	25%	13%
16. Highly qualified teachers fill job openings.	2%	25%	51%	17%	5%
17. Teacher openings are filled quickly.	4%	29%	53%	11%	3%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
18. Teachers are rewarded for superior performance.	3%	22%	57%	13%	5%
19. Teachers are counseled about less than satisfactory performance.	3%	25%	63%	6%	3%
20. All schools have equal access to educational materials such as computers, television monitors, science labs, and art classes.	8%	33%	46%	7%	6%
21. The student-teacher ratio is reasonable.	7%	36%	45%	9%	3%
22. Students have access, when needed, to a school nurse.	13%	46%	37%	3%	1%
23. Classrooms are seldom left unattended.	8%	27%	55%	8%	2%
24. The district does a good job preparing students for post-secondary education.	5%	23%	58%	11%	3%
25. Teachers integrate technology into instruction.	9%	33%	48%	7%	3%
26. Students use technology to do their work.	9%	36%	47%	6%	2%
27. New teachers have appropriate professional development and support.	10%	27%	52%	7%	4%
28. The district has a program evaluation process and procedures looking at all the components of a program, not just at student test (TAKS, 6-week assessments) scores.	8%	26%	52%	12%	2%

C. PERSONNEL MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
29. District salaries are competitive with similar positions in the job market.	7%	34%	29%	16%	14%
30. The district has a good and timely program for orienting new employees.	7%	32%	37%	13%	11%
31. Substitute workers are rarely used.	2%	15%	45%	27%	11%
32. The district successfully projects future staffing needs.	5%	25%	47%	16%	7%
33. The district has an effective employee recruitment program.	5%	23%	48%	15%	9%
34. The district operates an effective staff development program.	8%	26%	47%	15%	4%
35. District employees receive annual personnel evaluations.	14%	35%	36%	8%	7%
36. The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	3%	17%	49%	16%	15%
37. Employees who perform below the standard of expectation are counseled appropriately and timely.	2%	18%	53%	18%	9%
38. The district has a fair and timely grievance process.	5%	23%	52%	13%	7%
39. The district's health insurance package meets my needs.	9%	38%	24%	15%	14%

D.   COMMUNITY INVOLVEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
40. The district regularly communicates with parents.	9%	33%	42%	12%	4%
41. The district regularly communicates with Spanish speaking parents.	7%	31%	46%	10%	6%
42. The local television and radio stations regularly report school news and menus.	4%	19%	49%	20%	8%
43. Schools have plenty of volunteers to help student and school programs.	4%	17%	48%	24%	7%
44. District facilities are open for community use.	6%	34%	48%	9%	3%
45. The district actively recruits local businesses and industry as partners to help students and school programs.	9%	35%	47%	7%	2%
46. The district informs parents and community members about new initiatives and programs.	11%	34%	44%	9%	2%
47. The district informs parents and community members about new initiatives and programs in Spanish.	9%	33%	45%	8%	5%
48. The district involves parents and community members in the development of district and campus improvement plans.	9%	33%	48%	6%	4%

E.   FACILITIES USE AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
49. Parents, citizens, students, faculty, staff, and the board provide input into facility planning.	7%	21%	51%	15%	6%
50. The architect and construction managers are selected objectively and impersonally.	4%	17%	63%	11%	5%
51. Schools are clean.	27%	47%	18%	7%	1%
52. Buildings are properly maintained in a timely manner.	24%	44%	22%	8%	2%
53. Repairs are made in a timely manner.	15%	42%	28%	11%	4%
54. Emergency maintenance is handled promptly.	20%	43%	27%	8%	2%

F.   FINANCIAL MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
55. Campus administrators are given ample opportunity to participate in the development of the district's budget.	5%	16%	62%	9%	8%
56. Campus administrators are well-trained in fiscal management techniques.	5%	14%	67%	7%	7%
57. The district's financial reports are easy to understand and read.	3%	14%	63%	12%	8%
58. Financial reports are made available to community members when asked.	2%	15%	73%	8%	2%
59. The district has adequate safety programs and training to prevent work-related accidents.	4%	23%	56%	13%	4%
60. My payroll check is always correct.	6%	36%	21%	25%	12%
61. My payroll check is always issued on time.	20%	56%	21%	2%	1%

F.   FINANCIAL MANAGEMENT (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
62. The district's Payroll Department does a good job of processing the district's payroll.	12%	39%	30%	14%	5%
63. The district's Accounts Payable Department does a good job of paying vendors the correct amount.	5%	28%	57%	7%	3%
64. The district's Accounts Payable Department does a good job of paying vendors on time.	6%	24%	63%	4%	3%

G.   PURCHASING AND WAREHOUSING

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
65. Purchasing has made it easy to get what I need.	6%	30%	52%	10%	2%
66. Purchasing identifies the highest quality materials and equipment at the lowest cost.	3%	19%	67%	9%	2%
67. Purchasing processes are cumbersome for the requestor.	5%	17%	65%	13%	0%
68. The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	2%	15%	68%	12%	3%
69. Students are issued textbooks in a timely manner.	2%	20%	56%	13%	9%
70. Textbooks are in good shape.	3%	32%	57%	7%	1%
71. The school library meets student needs for books and other resources for students.	8%	33%	52%	6%	1%

H.   TRANSPORTATION

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
72. Transportation gets students to school on time.	18%	38%	34%	7%	3%
73. Transportation promptly picks up students at the end of the day.	18%	42%	35%	4%	1%
74. The quality of service provided by Transportation on field trips is high.	16%	32%	47%	4%	1%
75. School buses are clean and well maintained.	11%	33%	49%	6%	1%
76. School principals quickly and fairly discipline students that are disruptive on the school bus.	12%	26%	50%	9%	3%

I.   SAFETY AND SECURITY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
77. Gangs are not a problem in this district.	6%	15%	37%	28%	14%
78. Drugs are not a problem in this district.	3%	14%	36%	32%	15%
79. Vandalism is not a problem in this district.	4%	16%	38%	27%	15%
80. Security personnel have a good working relationship with principals and teachers.	9%	27%	54%	7%	3%
81. Security personnel are respected and liked by the students they serve.	6%	22%	59%	8%	5%

I.   SAFETY AND SECURITY (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
82. A good working arrangement exists between local law enforcement and the district.	10%	36%	46%	4%	4%
83. Students receive fair and equitable discipline for misconduct.	5%	25%	45%	12%	13%

J.   COMPUTERS AND TECHNOLOGY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
84. Students have access to and use of computers.	18%	42%	36%	4%	0%
85. Students have regular access to computer equipment and software in the classroom.	14%	37%	39%	8%	2%
86. Teachers use computers in the classroom for instructional purposes.	14%	37%	43%	6%	0%
87. Computers are updated to be useful for student instruction.	14%	32%	46%	6%	2%
88. The district meets students needs in computer fundamentals.	11%	34%	45%	8%	2%
89. The district meets students' needs in advanced computer skills.	9%	31%	49%	9%	2%
90. Teachers and students have easy access to the Internet.	16%	38%	40%	5%	1%
91, Computer labs meet instructional needs.	13%	33%	47%	6%	1%

PRINCIPAL AND ASSISTANT PRINCIPAL SURVEY

(Total number of Respondents = 24)

PART A. DEMOGRAPHIC DATA

NOTE: Totals may not equal 100 percent due to rounding.

1.	GENDER (OPTIONAL)	MALE	FEMALE
		29%	71%

2.	ETHNICITY (OPTIONAL)	ANGLO	AFRICAN AMERICAN	HISPANIC	ASIAN	OTHER
		60%	10%	10%	10%	5%

3.	HOW LONG HAVE YOU BEEN EMPLOYED BY MANOR ISD?	LESS THAN 1 YEAR	1–5 YEARS	6–10 YEARS	11–15 YEARS	16–20 YEARS	20+ YEARS
		25%	63%	12%	0%	0%	0%

4. WHAT GRADE(S) ARE TAUGHT IN YOUR SCHOOL?

PRE-KINDERGARTEN	KINDERGARTEN	FIRST GRADE
46%	46%	50%
SECOND GRADE	**THIRD GRADE**	**FOURTH GRADE**
46%	50%	50%
FIFTH GRADE	**SIXTH GRADE**	**SEVENTH GRADE**
52%	4%	4%
EIGHTH GRADE	**NINTH GRADE**	**TENTH GRADE**
4%	46%	42%
ELEVENTH GRADE	**TWELFTH GRADE**	
42%	25%	

PART B. SURVEY QUESTIONS

A. DISTRICT ORGANIZATION AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
1. The school board allows sufficient time for public input at meetings.	33%	38%	25%	4%	0%
2. School board members listen to the opinions and desires of others.	17%	58%	17%	8%	0%
3. School board members understand their role as policymakers and stay out of the day-to-day management of the district.	8%	58%	17%	13%	4%
4. The superintendent is a respected and effective instructional leader.	29%	50%	0%	13%	8%
5. The superintendent is a respected and effective business manager.	17%	58%	13%	4%	8%
6. Central Administration is efficient.	4%	58%	0%	25%	13%
7. Central administration supports the educational process.	13%	63%	8%	12%	4%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
8. The morale of central administration staff is good.	13%	50%	17%	16%	4%
9. Education is the main priority in our school district.	25%	54%	4%	13%	4%
10. Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	8%	50%	25%	17%	0%
11. The needs of the college-bound student are being met.	4%	38%	33%	21%	4%
12. The needs of the work-bound student are being met.	0%	33%	50%	17%	0%
13. The district provides curriculum guides for all grades and subjects.	4%	54%	25%	17%	0%
14. The curriculum guides are appropriately aligned and coordinated.	4%	29%	38%	21%	8%
15. The district's curriculum guides clearly outline what to teach and how to teach it.	4%	17%	38%	29%	12%
16. The district has effective educational programs for the following:					
a) Reading	4%	59%	25%	8%	4%
b) Writing	0%	50%	21%	25%	4%
c) Mathematics	0%	62%	17%	17%	4%
d) Science	0%	54%	17%	25%	4%
e) English or Language Arts	4%	59%	29%	4%	4%
f) Computer Instruction	0%	75%	17%	8%	0%
g) Social Studies (history or geography)	0%	58%	25%	13%	4%
h) Fine Arts	0%	63%	25%	12%	0%
i) Physical Education	0%	63%	29%	8%	0%
j) Business Education	0%	46%	50%	4%	0%
k) Vocational (Career and Technology) Education	4%	50%	42%	4%	0%
l) Foreign Language	4%	42%	50%	4%	0%
17. The district has effective special programs for the following:					
a) Library Service	0%	58%	21%	21%	0%
b) Honors/Gifted and Talented Education	8%	46%	29%	17%	0%
c) Special Education	13%	46%	25%	12%	4%
d) Head Start and Even Start programs	8%	42%	50%	0%	0%
e) Dyslexia program	4%	42%	33%	21%	0%
f) Student mentoring program	4%	71%	17%	8%	0%
g) Advanced placement program	0%	58%	38%	4%	0%
h) Literacy program	4%	33%	54%	9%	0%
i) Programs for students at risk of dropping out of school	0%	54%	25%	21%	0%
j) Summer school programs	0%	54%	29%	8%	9%
k) Alternative education programs	0%	46%	33%	17%	4%
l) "English as a second language" program	0%	63%	25%	12%	0%
m) Career counseling program	0%	29%	58%	13%	0%
n) College counseling program	0%	42%	50%	8%	0%
o) Counseling the parents of students	0%	21%	42%	37%	0%

B.   EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
18. Parents are immediately notified if a child is absent from school.	0%	29%	33%	29%	9%
19. Teacher turnover is low.	0%	46%	0%	46%	8%
20. Highly qualified teachers fill job openings.	4%	62%	17%	17%	0%
21. Teachers are rewarded for superior performance.	0%	46%	17%	21%	16%
22. Teachers are counseled about less than satisfactory performance.	4%	71%	17%	8%	0%
23. All schools have equal access to educational materials such as computers, television monitors, science labs, and art classes.	13%	38%	8%	29%	12%
24. Students have access, when needed, to a school nurse.	38%	54%	4%	4%	0%
25. Classrooms are seldom left unattended.	21%	67%	8%	4%	0%
26. The district does a good job preparing students for post-secondary education.	0%	42%	42%	4%	12%
27. Teachers integrate technology into instruction.	12%	54%	17%	17%	0%
28. Students use technology to do their work.	17%	57%	13%	13%	0%
29. New teachers have appropriate professional development and support.	8%	67%	8%	13%	4%
30. The district has a program evaluation process and procedures looking at all the components of a program, not just at student test (TAKS, 6-week assessments) scores.	4%	58%	9%	21%	8%

C.   PERSONNEL MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
31. District salaries are competitive with similar positions in the job market.	25%	46%	12%	17%	0%
32. The district has a good and timely program for orienting new employees.	12%	67%	17%	4%	0%
33. Substitute workers are rarely used.	0%	13%	21%	58%	8%
34. The district successfully projects future staffing needs.	8%	42%	29%	21%	0%
35. The district has an effective employee recruitment program.	9%	54%	25%	4%	8%
36. The district operates an effective staff development program.	4%	54%	21%	17%	4%
37. District employees receive annual personnel evaluations.	13%	71%	12%	4%	0%
38. The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	0%	0%	0%	75%	25%
39. Employees who perform below the standard of expectation are counseled appropriately and timely.	0%	63%	25%	4%	85
40. The district has a fair and timely grievance process.	4%	63%	29%	0%	4%
41. The district's health insurance package meets my needs.	0%	75%	8%	13%	4%

D. COMMUNITY INVOLVEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
42. The district regularly communicates with parents.	13%	62%	8%	17%	0%
43. The district regularly communicates with Spanish speaking parents.	13%	50%	17%	12%	8%
44. Schools have plenty of volunteers to help student and school programs.	13%	33%	17%	25%	12%
45. District facilities are open for community use.	17%	75%	4%	4%	0%
46. The district actively recruits local businesses and industry as partners to help students and school programs.	8%	71%	8%	13%	0%
47. The district informs parents and community members about new initiatives and programs.	8%	67%	13%	12%	0%
48. The district informs parents and community members about new initiatives and programs in Spanish.	4%	58%	17%	17%	4%
49. The district involves parents and community members in the development of district and campus improvement plans.	4%	58%	17%	17%	4%

E. FACILITIES USE AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
50. Parents, citizens, students, faculty, staff, and the board provide input into facility planning.	8%	63%	25%	4%	0%
51. Schools are clean.	17%	83%	0%	0%	0%
52. Buildings are properly maintained in a timely manner.	17%	75%	8%	0%	0%
53. Repairs are made in a timely manner.	21%	67%	4%	8%	0%
54. Emergency maintenance is handled promptly.	25%	63%	0%	12%	0%
55. Procedures for submitting work orders are clearly defined by the Environmental Services Department.	17%	50%	17%	16%	0%

F. FINANCIAL MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
56. I am given ample opportunity to participate in the development of my school's budget and to determine how much money my school will have to spend during the year.	4%	38%	21%	25%	12%
57. I fully understand the district's financial management policies and procedures and what is expected of me to monitor and protect the financial resources that have been allocated to my school.	4%	42%	25%	25%	4%
58. I have received adequate training on the Skyward system.	0%	38%	8%	25%	29%
59. I understand how to use the Skyward system for the financial management of my school.	0%	37%	17%	21%	25%
60. I would like to be able to move funds from one spending category to the other without contacting central office as long as it does not change my overall budget total.	13%	33%	42%	8%	4%

F.   FINANCIAL MANAGEMENT (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
61. The level of oversight that I have over student activity funds is adequate to ensure that funds are not misused or misappropriated.	8%	42%	33%	17%	0%
62. The district has adequate safety and training programs to prevent work-related accidents.	4%	38%	33%	25%	0%
63. My payroll check is always correct.	13%	58%	13%	12%	4%
64. My payroll check is always issued on time.	21%	79%	0%	0%	0%
65. The district's Payroll Department does a good job of processing the district's payroll.	13%	67%	12%	4%	4%
66. The district's Accounts Payable Department does a good job of paying vendors the correct amount.	8%	50%	42%	0%	0%
67. The district's Accounts Payable Department does a good job of paying vendors on time.	8%	54%	38%	0%	0%

G.   PURCHASING AND WAREHOUSING

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
68. Purchasing has made it easy to get what I need.	9%	46%	33%	8%	4%
69. Purchasing identifies high quality materials and equipment at the lower cost.	0%	42%	50%	8%	0%
70. Purchasing processes are cumbersome for the requestor.	0%	33%	46%	21%	0%
71. The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	4%	16%	42%	21%	17%
72. Students are issued textbooks in a timely manner.	4%	42%	29%	13%	12%
73. Textbooks are in good shape.	9%	58%	29%	4%	0%
74. The school library meets student needs for books and other resources.	4%	50%	17%	17%	12%
75. The school library meets student needs for books and other resources in Spanish.	4%	46%	17%	25%	8%
76. I have the ancillary sets that I need.	0%	21%	42%	21%	16%
77. Textbooks are applicable to the subject matter.	13%	58%	29%	0%	0%

H.   FOOD SERVICES

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
78. The cafeteria's food looks and tastes good.	17%	67%	12%	4%	0%
79. Food is served at the right temperature.	17%	71%	12%	0%	0%
80. Students have enough time to eat.	17%	83%	0%	0%	0%
81. Students eat lunch at the appropriate time of day.	17%	83%	0%	0%	0%
82. Students wait in food lines no longer than 10 minutes.	17%	71%	4%	8%	0%
83. Discipline and order are maintained in the school cafeteria.	21%	75%	4%	0%	0%
84. Cafeteria staff is helpful and friendly.	33%	67%	0%	0%	0%

H.   FOOD SERVICES (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
85. Cafeteria facilities are sanitary and neat.	37%	63%	0%	0%	0%
86. Breakfast has improved student attendance/ timeliness.	17%	50%	25%	4%	4%
87. Wellness Wednesday has improved student attendance/timeliness.	9%	21%	58%	8%	4%

I.   TRANSPORTATION

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
88. The drop-off zone at the school is safe.	25%	67%	4%	4%	0%
89. The district has a simple method to request buses for special events.	25%	67%	0%	8%	0%
90. Buses arrive and leave on time.	13%	75%	4%	8%	0%
91. Adding or modifying a route for a student is easy to accomplish.	13%	54%	25%	8%	0%
92. The district locates new schools to minimize travel time for students.	13%	50%	33%	4%	0%
93. The school assignment pattern fairly balances students in all schools.	12%	46%	38%	4%	0%
94. Transportation gets students to school on time.	17%	67%	12%	4%	0%
95. Transportation promptly picks up students at the end of the day.	21%	71%	4%	4%	0%
96. The quality of service provided by Transportation on field trips is high.	25%	63%	8%	4%	0%
97. School buses are clean and well maintained.	25%	58%	17%	0%	0%

J.   SAFETY AND SECURITY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
98. Students feel safe and secure at school.	29%	71%	0%	0%	0%
99. School disturbances are infrequent.	29%	58%	4%	9%	0%
100. Gangs are not a problem in this district.	4%	33%	29%	34%	0%
101. Drugs are not a problem in this district.	4%	21%	29%	42%	4%
102. Vandalism is not a problem in this district.	4%	42%	33%	21%	0%
103. Security personnel have a good working relationship with principals and teachers.	8%	50%	42%	0%	0%
104. Security personnel are respected and liked by the students they serve.	8%	38%	54%	0%	0%
105. A good working arrangement exists between local law enforcement and the district.	13%	46%	33%	8%	0%
106. Students receive fair and equitable discipline for misconduct.	13%	71%	4%	8%	4%
107. Safety hazards do not exist on school grounds.	13%	71%	8%	8%	0%

K.   COMPUTERS AND TECHNOLOGY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
108. Students have access to and use of computers.	21%	79%	0%	0%	0%
109. Students have regular access to computer equipment and software in the classroom.	21%	58%	0%	17%	4%
110. Teachers use computers in the classroom for instructional purposes.	21%	62%	0%	17%	0%
111. Computers are updated to be useful for student instruction.	21%	67%	0%	8%	4%
112. The district meets students' needs in computer fundamentals.	17%	67%	4%	12%	0%
113. The district meets students' needs in advanced computer skills.	17%	50%	17%	12%	4%
114. Teachers and students have easy access to the Internet.	21%	79%	0%	0%	0%
115. Computer labs meet instructional needs.	17%	71%	8%	4%	0%

TEACHER SURVEY

(Total number of Respondents = 92)

PART A. DEMOGRAPHIC DATA

NOTE: Totals may not equal 100 percent due to rounding.

1.	GENDER (OPTIONAL)	MALE	FEMALE
		17%	83%

2.	ETHNICITY (OPTIONAL)	ANGLO	AFRICAN AMERICAN	HISPANIC	ASIAN	OTHER
		71%	11%	15%	1%	2%

3.	HOW LONG HAVE YOU BEEN EMPLOYED BY MANOR ISD?	LESS THAN 1 YEAR	1–5 YEARS	6–10 YEARS	11–15 YEARS	16–20 YEARS	20+ YEARS
		23%	51%	14%	6%	1%	5%

4.   WHAT GRADE(S) DO YOU TEACH THIS YEAR?

PRE-KINDERGARTEN	KINDERGARTEN	FIRST GRADE
12%	22%	17%
SECOND GRADE	**THIRD GRADE**	**FOURTH GRADE**
18%	21%	20%
FIFTH GRADE	**SIXTH GRADE**	**SEVENTH GRADE**
20%	16%	18%
EIGHTH GRADE	**NINTH GRADE**	**TENTH GRADE**
16%	18%	24%
ELEVENTH GRADE	**TWELFTH GRADE**	
22%	23%	

PART B. SURVEY QUESTIONS

A.   DISTRICT ORGANIZATION AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
1. The school board allows sufficient time for public input at meetings.	4%	22%	64%	8%	2%
2. School board members listen to the opinions and desires of others.	8%	31%	48%	8%	5%
3. School board members work well with the superintendent.	14%	19%	53%	12%	2%
4. The school board has a good image in the community.	7%	34%	37%	16%	6%
5. The superintendent is a respected and effective instructional leader.	15%	36%	27%	14%	8%
6. The superintendent is a respected and effective business manager.	14%	38%	34%	9%	5%

A. DISTRICT ORGANIZATION AND MANAGEMENT (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
7. Central administration is efficient.	3%	43%	9%	34%	11%
8. Central administration supports the educational process.	9%	49%	16%	16%	10%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
9. The morale of central administration staff is good.	7%	35%	36%	18%	4%
10. Education is the main priority in our school district.	17%	45%	9%	23%	6%
11. Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	10%	39%	11%	30%	10%
12. The needs of the college-bound student are being met.	2%	38%	40%	18%	2%
13. The needs of the work-bound student are being met.	2%	26%	42%	23%	7%
14. The district provides curriculum guides for all grades and subjects.	11%	47%	15%	19%	8%
15. The curriculum guides are appropriately aligned and coordinated.	4%	32%	16%	30%	18%
16. The district's curriculum guides clearly outline what to teach and how to teach it.	2%	22%	21%	38%	17%
17. The district has effective educational programs for the following:					
a) Reading	5%	62%	11%	14%	8%
b) Writing	3%	44%	19%	29%	5%
c) Mathematics	8%	52%	15%	21%	4%
d) Science	5%	42%	23%	20%	10%
e) English or Language Arts	7%	59%	15%	13%	6%
f) Computer Instruction	7%	54%	17%	15%	7%
g) Social Studies (history or geography)	6%	47%	17%	22%	8%
h) Fine Arts	5%	42%	24%	19%	10%
i) Physical Education	8%	48%	25%	12%	7%
j) Business Education	2%	23%	63%	9%	3%
k) Vocational (Career and Technology) Education	2%	20%	63%	11%	4%
l) Foreign Language	3%	29%	57%	8%	3%
18. The district has effective special programs for the following:					
a) Library Service	11%	55%	12%	18%	4%
b) Honors/Gifted and Talented Education	10%	42%	15%	25%	8%
c) Special Education	17%	45%	5%	23%	10%
d) Head Start and Even Start programs	7%	23%	60%	6%	4%
e) Dyslexia program	6%	28%	33%	20%	13%
f) Student mentoring program	10%	49%	25%	12%	4%
g) Advanced placement program	6%	33%	46%	11%	4%
h) Literacy program	3%	36%	39%	19%	3%
i) Programs for students at risk of dropping out of school	3%	30%	41%	20%	6%

B.   EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
j) Summer school programs	4%	34%	30%	23%	9%
k) Alternative education programs	4%	28%	48%	15%	5%
l) "English as a second language" program	7%	47%	23%	18%	5%
m) Career counseling program	1%	13%	65%	11%	10%
n) College counseling program	2%	23%	64%	4%	7%
o) Counseling the parents of students	1%	19%	34%	29%	17%
19. Parents are immediately notified if a child is absent from school.	1%	16%	32%	33%	18%
20. Teacher turnover is low.	4%	14%	12%	25%	45%
21. Highly qualified teachers fill job openings.	9%	39%	16%	20%	16%
22. Teacher openings are filled quickly.	3%	33%	26%	25%	13%
23. Teachers are rewarded for superior performance.	1%	17%	20%	34%	28%
24. Teachers are counseled about less than satisfactory performance.	3%	38%	26%	20%	13%
25. Teachers are knowledgeable in the subject areas they teach.	18%	64%	9%	7%	2%
26. All schools have equal access to educational materials such as computers, television monitors, science labs, and art classes.	5%	27%	9%	32%	27%
27. The student-to-teacher ratio is reasonable.	12%	49%	3%	28%	8%
28. Classrooms are seldom left unattended.	23%	58%	6%	10%	3%
29. The district does a good job preparing students for post-secondary education.	1%	25%	43%	22%	9%
30. Teachers integrate technology into instruction.	8%	69%	5%	17%	1%
31. Students use technology to do their work.	5%	49%	14%	25%	7%
32. New teachers have appropriate professional development and support.	6%	49%	10%	23%	12%
33. The district has a program evaluation process and procedures looking at all the components of a program, not just at student test (TAKS, 6-week assessments) scores.	3%	23%	21%	34%	19%

C.   PERSONNEL MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
34. District salaries are competitive with similar positions in the job market.	21%	49%	11%	16%	3%
35. The district has a good and timely program for orienting new employees.	8%	52%	25%	12%	3%
36. Substitute workers are rarely used.	1%	12%	22%	34%	31%
37. The district successfully projects future staffing needs.	6%	24%	25%	32%	13%
38. The district has an effective employee recruitment program.	3%	34%	34%	19%	10%

C. PERSONNEL MANAGEMENT (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
39. The district operates an effective staff development program.	8%	42%	14%	23%	13%
40. District employees receive annual personnel evaluations.	10%	78%	8%	3%	1%
41. The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	1%	20%	23%	30%	26%
42. Employees who perform below the standard of expectation are counseled appropriately and timely.	3%	30%	27%	27%	13%
43. The district has a fair and timely grievance process.	3%	19%	60%	14%	4%
44. The district's health insurance package meets my needs.	10%	53%	6%	21%	10%

D. COMMUNITY INVOLVEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
45. The district regularly communicates with parents.	10%	53%	16%	18%	3%
46. The district regularly communicates with Spanish speaking parents.	9%	46%	26%	15%	4%
47. The local television and radio stations regularly report school news and menus.	3%	12%	32%	42%	11%
48. Schools have plenty of volunteers to help student and school and school programs.	2%	16%	14%	47%	21%
49. District facilities are open for community use.	4%	49%	30%	11%	6%
50. The district actively recruits local businesses and industry as partners to help students and school programs.	11%	57%	19%	5%	8%
51. The district informs parents and community members about new initiatives and programs.	8%	51%	21%	15%	5%
52. The district informs parents and community members about new initiatives and programs in Spanish.	6%	46%	32%	13%	3%
53. The district involves parents and community members in the development of district and campus improvement plans.	7%	47%	25%	17%	4%

E. FACILITIES USE AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
54. The district plans facilities construction far enough in the future to support enrollment growth.	11%	64%	7%	12%	6%
55. Parents, citizens, students, faculty, staff, and the board provide input into facility planning.	9%	36%	37%	14%	4%
56. The architect and construction managers are selected objectively and impersonally.	6%	16%	72%	3%	3%
57. The quality of new construction is excellent.	9%	40%	26%	20%	5%
58. Schools are clean.	20%	68%	5%	7%	0%

E.   FACILITIES USE AND MANAGEMENT (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
59. Buildings are properly maintained in a timely manner.	15%	59%	11%	13%	2%
60. Repairs are made in a timely manner.	12%	54%	7%	18%	9%
61. Emergency maintenance is handled promptly.	22%	51%	11%	10%	6%

F.   FINANCIAL MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
62. Site-based budgeting is used effectively to extend the involvement of principals and teachers.	8%	28%	37%	19%	8%
63. Campus administrators are well-trained in fiscal management techniques.	7%	25%	46%	13%	9%
64. Financial reports are allocated fairly and equitably at my school.	7%	18%	52%	12%	11%

G.   PURCHASING AND WAREHOUSING

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
65. Purchasing has made it easy to get what I need.	10%	20%	25%	23%	22%
66. Purchasing identifies the highest quality materials and equipment at the lowest cost.	7%	22%	42%	17%	12%
67. Purchasing processes are cumbersome for the requestor.	13%	36%	31%	16%	4%
68. Vendors are selected competitively.	5%	13%	71%	9%	2%
69. The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	2%	19%	28%	29%	22%
70. Students are issued textbooks in a timely manner.	4%	33%	20%	16%	27%
71. I have the ancillary textbooks that I need.	6%	32%	30%	12%	20%
72. Textbooks are applicable to the subject matter.	12%	56%	20%	10%	2%
73. Textbooks are in good shape.	14%	63%	13%	7%	3%
74. The school library meets student needs for books and other resources.	21%	44%	14%	12%	9%
75. The school library meets student needs for books and other resources in Spanish.	13%	33%	30%	14%	10%

H.   FOOD SERVICES

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
76. The cafeteria's food looks and tastes good.	6%	45%	17%	23%	9%
77. Food is served warm.	14%	66%	8%	11%	1%
78. Students eat lunch at the appropriate time of day.	16%	72%	6%	4%	2%
79. Students wait in food lines no longer than 10 minutes.	15%	54%	8%	16%	7%
80. Discipline and order are maintained in the school cafeteria.	13%	58%	8%	14%	7%
81. Cafeteria staff is helpful and friendly.	37%	46%	6%	8%	3%
82. Cafeteria facilities are sanitary and neat.	36%	58%	4%	2%	0%

I. TRANSPORTATION

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
83. Transportation gets students to school on time.	12%	55%	11%	19%	3%
84. Transportation promptly picks up students at the end of the day.	22%	67%	8%	2%	1%
85. The quality of service provided by Transportation on field trips is high.	21%	53%	20%	4%	2%
86. School buses are clean and well maintained.	21%	52%	22%	5%	0%
87. School principals quickly and fairly discipline students that are disruptive on the school bus.	8%	38%	31%	15%	8%

J. SAFETY AND SECURITY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
88. School disturbances are infrequent.	9%	39%	4%	33%	15%
89. Gangs are not a problem in this district.	3%	15%	19%	43%	20%
90. Drugs are not a problem in this district.	2%	12%	24%	37%	25%
91. Vandalism is not a problem in this district.	3%	18%	19%	38%	22%
92. Security personnel have a good working relationship with principals and teachers.	10%	39%	40%	9%	2%
93. Security personnel are respected and liked by the students they serve.	12%	26%	54%	7%	1%
94. A good working arrangement exists between local law enforcement and the district.	10%	48%	34%	4%	4%
95. Students receive fair and equitable discipline for misconduct.	6%	35%	12%	24%	23%
96. Safety hazards do not exist on school grounds.	6%	37%	18%	25%	14%

K. COMPUTERS AND TECHNOLOGY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
97. Students have access to and use of computers.	19%	64%	3%	10%	4%
98. Students have regular access to computer equipment and software in the classroom.	12%	40%	5%	33%	10%
99. Teachers use computers in the classroom for instructional purposes.	18%	63%	9%	8%	2%
100. Computers are updated to be useful for student instruction.	15%	50%	15%	15%	5%
101. The district meets students' needs in computer fundamentals.	11%	55%	10%	15%	9%
102. The district meets students' needs in advanced computer skills.	8%	34%	29%	15%	14%
103. Teachers and students have easy access to the Internet.	21%	59%	3%	11%	6%
104. Computer labs meet instructional needs.	15%	59%	13%	10%	3%

STUDENT SURVEY

(Total number of Respondents = 66)

PART A. DEMOGRAPHIC DATA

NOTE: Totals may not equal 100 percent due to rounding.

1.	GENDER (OPTIONAL)	MALE	FEMALE
		45%	55%

2.	ETHNICITY (OPTIONAL)	ANGLO	AFRICAN AMERICAN	HISPANIC	ASIAN	OTHER
		14%	26%	44%	2%	14%

3.	WHAT IS YOUR CLASSIFICATION? (ONLY SENIORS RESPONDED)	SENIOR

PART B. SURVEY QUESTIONS

A.   EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
1. The needs of the college-bound student are being met.	1%	41%	15%	35%	8%
2. The needs of the work-bound student are being met.	5%	41%	30%	21%	3%
3. The district has effective educational programs for the following:					
a) Reading	17%	50%	21%	12%	0%
b) Writing	17%	56%	20%	7%	0%
c) Mathematics	3%	35%	14%	30%	18%
d) Science	14%	56%	12%	15%	3%
e) English or Language Arts	24%	56%	8%	12%	0%
f) Computer Instruction	18%	47%	20%	15%	0%
g) Social Studies (history or geography)	24%	56%	8%	12%	0%
h) Fine Arts	20%	51%	15%	11%	3%
i) Physical Education	17%	45%	26%	9%	3%
j) Business Education	3%	42%	29%	17%	9%
k) Vocational (Career and Technology) Education	5%	35%	45%	11%	4%
l) Foreign Language	5%	48%	18%	26%	3%
4. The district has effective special programs for the following:					
a) Library Service	14%	54%	20%	9%	3%
b) Honors/Gifted and Talented Education	8%	45%	24%	18%	5%
c) Special Education	14%	35%	42%	7%	2%
d) Student mentoring program	5%	36%	39%	14%	6%
e) Advanced placement program	12%	58%	15%	11%	4%

A. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
f) Career counseling program	4%	29%	29%	21%	17%
g) College counseling program	23%	35%	20%	15%	7%
5. Students have access, when needed, to a school nurse.	7%	38%	20%	20%	15%
6. Classrooms are seldom left unattended.	6%	36%	24%	23%	11%
7. The district provides a high-quality education.	0%	27%	26%	24%	23%
8. The district has a high-quality of teachers.	1%	38%	20%	24%	17%

B. FACILITIES USE AND MANAGEMENT

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
9. Schools are clean.	8%	39%	15%	33%	5%
10. Buildings are properly maintained in a timely manner.	9%	45%	17%	29%	0%
11. Repairs are made in a timely manner.	6%	30%	18%	38%	8%
12. Emergency maintenance is handled timely.	6%	42%	23%	20%	9%
13. School facilities are readily available for student activities.	8%	39%	21%	29%	3%

C. PURCHASING AND WAREHOUSING

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
14. There are enough textbooks in all my classes.	4%	9%	17%	29%	41%
15. Students are issued textbooks in a timely manner.	0%	9%	27%	26%	38%
16. Textbooks are in good shape.	0%	8%	24%	38%	30%
17. The school library meets student needs for books and other resources.	14%	38%	21%	14%	13%

D. FOOD SERVICES

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
18. The school breakfast program is available to all children.	36%	38%	15%	6%	5%
19. The cafeteria's food looks and tastes good.	2%	15%	18%	30%	35%
20. Food is served warm.	4%	41%	20%	23%	12%
21. Students have enough time to eat.	1%	32%	11%	41%	15%
22. Students eat lunch at the appropriate time of day.	9%	70%	9%	6%	6%
23. Students wait in food lines no longer than 10 minutes.	6%	26%	23%	24%	21%
24. Discipline and order are maintained in the school's cafeteria.	3%	53%	21%	15%	8%
25. Cafeteria staff is helpful and friendly.	9%	44%	21%	11%	15%
26. Cafeteria facilities are sanitary and neat.	11%	38%	27%	14%	10%

E.   TRANSPORTATION

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
27. I regularly ride the bus.	7%	26%	18%	14%	35%
28. The bus driver maintains discipline on the bus.	7%	23%	47%	11%	12%
29. The length of the student's bus ride is reasonable.	7%	30%	47%	11%	5%
30. The drop-off zone at the school is safe.	8%	36%	52%	1%	3%
31. The bus stop near my house is safe.	8%	36%	50%	5%	1%
32. The bus stop is within walking distance from our home.	11%	29%	50%	3%	7%
33. Buses arrive and depart on time.	3%	20%	54%	17%	6%
34. Buses arrive early enough for students to eat breakfast at school.	5%	18%	51%	14%	12%
35. Buses seldom break down.	5%	15%	56%	9%	15%
36. Buses are clean.	3%	18%	59%	9%	11%
37. Bus drivers allow students to sit down before taking off.	8%	24%	48%	8%	12%

F.   SAFETY AND SECURITY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
38. I feel safe and secure at school.	6%	39%	23%	20%	12%
39. School disturbances are infrequent.	0%	20%	38%	32%	10%
40. Gangs are not a problem in this district.	0%	30%	30%	26%	14%
41. Drugs are not a problem in this district.	3%	17%	30%	26%	24%
42. Vandalism is not a problem in this district.	3%	17%	32%	30%	18%
43. Security personnel have a good working relationship with principals and teachers.	8%	38%	36%	7%	11%
44. Security personnel are respected and liked by the students they serve.	1%	23%	39%	20%	17%
45. A good working arrangement exists between local law enforcement and the district.	1%	32%	41%	17%	9%
46. Students receive fair and equitable discipline for misconduct.	2%	18%	33%	23%	24%
47. Safety hazards do not exist on school grounds.	4%	20%	39%	20%	17%

G.   COMPUTERS AND TECHNOLOGY

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
48. Students have access to and use of computers.	9%	50%	18%	17%	6%
49. Students have regular access to computer equipment and software in the classroom.	4%	44%	17%	23%	12%
50. Teachers use computers in the classroom for instructional purposes.	12%	48%	21%	14%	5%
51. Computers are updated to be useful for student instruction.	12%	38%	14%	30%	6%
52. The district meets students' needs in advanced computer fundamentals.	3%	30%	23%	23%	21%

G. COMPUTERS AND TECHNOLOGY (CONTINUED)

SURVEY QUESTIONS	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
53. The district meets students' needs in advanced computer skills.	5%	36%	33%	14%	12%
54. Teachers and students have easy access to the Internet.	3%	29%	16%	26%	26%
55. Computer labs meet instructional needs.	9%	35%	35%	14%	7%