

Executive Summary

The Socorro Independent School District

A Texas School Performance Review

The Comptroller's Texas School Performance Review (TSPR) was created by the Texas Legislature in 1990 to help the state's school districts, large and small, deliver the best possible educational services to their children in the most efficient and cost-effective way. Texas is in the forefront of the nation's jarring transition to an information-based economy, and the education given its children will play a vital role in determining the state's future prosperity. A well-trained workforce will be our state's greatest competitive asset in the next century. We must protect this resource and make absolutely sure that every Texas child has an opportunity to learn.

Parents and families are customers of our school districts as well their children, and so are the teachers, principals, and other employees who work with admirable dedication in thousands of schools across Texas. Ultimately, too, the property taxpayers who support their local schools benefit from efficient and effective schools, and they pay a good deal for it. They deserve to know that their dollars are spent wisely.

At a time when Texas is engaged in a critical debate over how-and how much-to pay for the education of its schoolchildren, all these customers deserve to know that schools are accountable both for their cost and the quality of the education they deliver. Only then will they be willing to invest the time, energy, and resources needed to ensure that all future Texans receive the education they need to succeed.

TSPR in El Paso

TSPR began its review of the Socorro Independent School District (SISD) in October 1997. As in its previous reviews of 25 other Texas school districts, the review team came to El Paso in response to a local call for assistance. In February 1997, only days after assuming his position, SISD Superintendent Don Schulte joined Senator Eliot Shapleigh in requesting a review of the district. In his letter, Mr. Schulte expressed pride in the district's accomplishments, but asked the Comptroller for suggestions that could make a good district even better. With the help of experts provided by Neal & Gibson, an Austin-based consulting firm, the TSPR team interviewed district employees, school board members, students, parents, business leaders, and representatives from community organizations. In addition, the review team collected comments from letters to the Comptroller and calls to a toll-free hotline.

To obtain comments from community residents, TSPR held open forums at two district high schools and conducted four focus groups that yielded valuable comments from current and former district employees, parents, community leaders, and students. Written surveys were sent to all administrators, one-third of all teachers, 480 parents, and 250 students. Of the 162 teachers and school administrators that responded to this survey, 48 percent work at elementary schools, 25 percent at middle schools, and 22 percent at high schools. Thirty-four parents representing 13 of the district's campuses sent responses, and 237 students participated in the survey. A number of one-on-one interviews helped the review team fine-tune its findings and recommendations. Details from the surveys, public forums, and focus groups are provided in **Appendices A through F**.

In addition to its extensive interviews, the review team consulted databases of comparative educational information gathered by the Texas Education Agency (TEA)-the Academic Excellence Indicator System and the Public Education Information Management System. To make useful comparisons, the review team also asked SISD to select similar, or peer, Texas school districts. The district chose Edinburg, Pharr-San Juan-Alamo, Southwest, United, Ysleta, Laredo, and El Paso school districts. These districts have significant characteristics in common with SISD, such as enrollment, demographic features, and/or similar economic resources. Ysleta and El Paso are significantly larger than SISD, but they are in the same area and have similar demographics; the district felt that its community regularly compares these districts to SISD and therefore that they should be included. **Exhibit E-1** compares SISD and peer district enrollment.

Exhibit E-1

SISD and Selected Peer District Enrollments

1996-97

District	Enrollment	% Economically Disadvantaged
El Paso	64,444	67.2
Ysleta	47,366	68.1
United	21,387	70.1
Socorro	21,098	70.4
Southwest	9,219	74.0
Edinburg	19,153	86.2

Laredo	22,987	86.6
Pharr-San Juan-Alamo	20,362	87.0

Source: AEIS.

TSPR visited each SISD school, targeting 12 areas of operation:

- District organization and management
- Educational service delivery and student performance
- Community involvement
- Personnel management
- Facilities use and management
- Financial management
- Asset and risk management
- Purchasing and distribution
- Computer technology
- Food services
- Transportation
- Safety and security

Acknowledgments

The Texas School Performance Review and its consulting firm, Neal & Gibson, wish to thank the Socorro Independent School District Board of Trustees; Superintendent Don Schulte; Ben DeBellis, who acted as district liaison to the review team; and the district employees, students, and community members who provided valuable information and assistance during TSPR's work in the district. In particular, we are grateful to Superintendent Schulte for making district personnel available to the review team; Ben DeBellis for coordinating data requests and providing relevant financial information; and Vicki Icard, Sue Bawcom, and Ernie Salcido who assisted in scheduling and coordinating focus group sessions and other interviews.

Socorro ISD

SISD is one of Texas' fastest-growing districts, having doubled in size over the last ten years. It is also one of the state's poorest districts, ranking 852 out of 1,037 school districts in property wealth per pupil. Of the nearly 22,000 children currently enrolled, more than 70 percent are considered economically disadvantaged; 89 percent are Hispanic, 9 percent are Anglo, and 2 percent were members of other minorities.

Yet in a time when many districts cite large numbers of minority and economically disadvantaged children as a reason for declining student

performance, TEA rates two SISD campuses as 'exemplary,' three as 'recognized,' and 15 campuses as acceptable-and no campuses rated 'low-performing.'

SISD is one of only a handful of districts that have implemented districtwide year-round education to provide year-round learning for students and to alleviate overcrowding and lessen the need for additional buildings. SISD's fast growth has necessitated a vigorous construction program in recent years; 21 of the district's 23 schools were constructed in 1980 or afterward, and 11 have been built since 1990.

During the 1997-98 school year, SISD's 2,800 teachers, administrators, and support workers served nearly 22,000 students in 23 school campuses and three support facilities containing nearly 3 million square feet of floor space on 322 acres of land. The district's annual operating budget is \$114 million.

Texas School Performance Review: A History of Savings

For more than six years, the Texas School Performance Review (TSPR) has helped public school districts across the state ensure that they spend their scarce education dollars in the classroom, where they belong, rather than on red tape, paperwork, and needless bureaucracy.

TSPR fields invitations from public school districts of every size and shape—large or small, rich or poor, rural or urban. The team settles in for months of detailed study at no charge to district taxpayers. TSPR's goal is to identify ways to cut costs, reduce administrative overhead, streamline operations, and improve educational services—in short, to help school districts operate more effectively and efficiently within their available resources. Most of the Comptroller's recommendations come directly from teachers, parents, students, and others who live or work in the district. TSPR has found that these hard-working folks often have known for years what would help them improve their schools—if only someone would ask. The Comptroller asks.

Since 1991, TSPR has offered nearly 2,600 detailed ways to save taxpayers more than \$300 million in 25 public school districts throughout Texas. And TSPR has accomplished this without recommending the firing or laying off of a single classroom teacher.

Districts studied by the TSPR team to date include San Antonio, Richland Springs, San Saba, Cherokee, Lubbock, Victoria, West Orange/Cove Consolidated, Lake Travis, Dallas, Austin, Calhoun County, Midland, Paris, San Marcos Consolidated, Brownsville, Longview, San Angelo, Beaumont, Waco, United in Laredo, Tyler, Houston, Texarkana, Spring,

and Corpus Christi. A review of the Ysleta district will conclude in the near future, while studies of the Port Arthur, Wimberley, and Hamilton are under way. Reviews of the El Paso and Comal districts are anticipated to begin early in the 1998-99 school year.

In addition, TSPR conducts follow-up reviews in districts that have had at least one year to implement their recommendations. These subsequent reviews indicate that 89 percent of TSPR's combined proposals have been acted upon, saving local taxpayers more than \$80 million during their first years of implementation, with much more in additional savings expected in the following years.

TSPR's work is not a financial audit in the traditional sense. Its purpose is not to uncover financial wrongdoing or potentially criminal activities. Instead, each review tries to show the participating district how it might accomplish more with its existing budget.

Detailed information on any of TSPR's previous reviews should call the Texas School Performance Review toll-free.

Summary Results

In all, the review team found SISD to be a well-run district, particularly in light of its low-wealth status. The review team found many commendable practices that could be replicated by school districts across the state. But charged with finding ways to make a good district better, the team developed 115 recommendations during a five-month review of SISD that ended in March 1998.

The SISD review identified total savings of nearly \$8.8 million that could be realized by fiscal

2002-03. TSPR's recommendations also identify investment opportunities of nearly \$687,000 in fiscal 1998-99 and total investment opportunities of almost \$2.5 million through fiscal 2003. Cumulative net savings from all recommendations (savings less recommended investments) is projected to total more than \$6.3 million by fiscal 2003.

This report could produce gross savings in the first year of \$1.6 million, or 4 percent of SISD's administrative budget (total budget minus instructional costs such as teacher salaries and classroom supplies), or 1.4 percent of SISD's total annual operating budget. The savings opportunities identified in the report are conservative and should be considered the minimum that can be realized if all of TSPR's recommendations are implemented.

The total estimated savings and costs associated with TSPR's recommendations are listed at the end of this chapter. It should be understood that many TSPR recommendations would not have a direct financial impact, but nevertheless would produce important improvements over current policies and practices.

SHARED SERVICES IN EL PASO

When Senator Eliot Shapleigh first approached the Comptroller about conducting performance reviews of three school districts in the El Paso area, he was particularly interested in finding ways these districts could work together. He felt that cooperation between the districts and other governmental and service organizations in El Paso could help them find more cost-effective ways of using and expanding their limited resources. In that spirit, Senator Shapleigh asked the Comptroller's staff to help facilitate a Shared Services Summit held in El Paso in December 1997. This summit, held on the campus of the University of Texas at El Paso, was attended by persons from throughout the El Paso community, including legislators, El Paso City officials, members of the El Paso Sun Metro Board, county commissioners, judges, and representatives from the University of Texas at El Paso, El Paso Community College, the Texas Tech Health Science Center, the Life Management Center for MHMR Services, the El Paso County Sheriff's office, the El Paso Police Department, area school districts, and various labor organizations.

In a general session all attendees were asked to list the services their agencies or organizations currently provide; to identify current cooperative efforts with other groups; and to identify additional areas for cooperation. Responses were arranged under broad categories of Health Care, Work Force Development, Social Services, Education, Transportation, Law Enforcement/Criminal Justice, Early Childhood/Child Care, Food Services, Youth and Recreational Activities, Libraries, and Technology and Distance Learning. Smaller "breakout" sessions focused on specific topics. Participants were encouraged to discuss which cooperative efforts in these focus areas are working well; identify additional areas of cooperation; identify basic obstacles to cooperation in the focus areas; and outline the necessary steps to encourage greater cooperation in each area under discussion.

The summit identified a number of successful examples of cooperative programs in the El Paso area. The overall effect of these existing areas of cooperation has been an expansion of services offered to the community; improved efficiency within member organizations, so that limited resources are stretched as far as they can go; and a better understanding of each others' needs and goals.

Areas that appear promising for further cooperative efforts include the linkage of library services, cooperative purchasing of various commodities, sharing of transportation and transportation-related capabilities, and expansion of health care and other social services.

The most frequently mentioned obstacles to cooperation included territorialism, or "turf" disputes between organizations; competition for limited resources; fear of lost jobs; liability issues; limitations on time, money, and staff resources; and inadequate knowledge about the steps needed to encourage further cooperation and the legal implications of such steps.

Shared Services in Socorro ISD

TSPR's review of SISD was intended to identify opportunities to improve the effectiveness and efficiency of the district's operations and to highlight model programs that could be replicated by other districts. TSPR found notable examples of cooperation with other public and private entities that enhance school district operations and could serve as models for other districts statewide. Examples include:

- the El Paso Collaborative for Academic Excellence, an initiative that SISD joined in the 1993-94 school year in partnership with El Paso and Ysleta ISDs. This collaborative has received a five-year, \$15 million grant from the National Science Foundation's Urban Systemic Initiative. These funds are used to improve student performance in the areas of math and science.
- the Socorro Health Education Center, funded by a grant from the W. K. Kellogg Foundation, a joint effort between the University of Texas at El Paso, Texas Tech University Health Science Center, El Paso Community College, Thomason Labs, El Paso County, and the Kellogg Foundation. The center provides health services to the entire community; 5,000 individuals made more than 19,000 visits to the center last year.
- interlocal agreements with the cities of El Paso and Horizon as well as the Army Corps of Engineers on land development and facility improvements. These projects have provided the public with greater access to recreational facilities and reduced the district's overall costs.
- a contract with the City of El Paso to assess and collect SISD's property taxes. Twenty-six other jurisdictions, including the County of El Paso, El Paso ISD, Ysleta ISD, El Paso Community College, and the El Paso Hospital District also contract with the

City of El Paso, and have enjoyed high collection rates and efficient service.

- an innovative shared-transportation approach for delivering hearing-impaired students to an El Paso ISD school for the deaf. Bus routes are shared with Clint, Elizario, and Fort Hancock ISDs. Each district transports its own students, along with those from the other districts, to and from El Paso ISD on assigned schedules that have little overlap. Services are bartered, and everyone benefits from the shared approach.

In addition, this report outlines a number of areas where cooperation with other entities should be fostered and encouraged by SISD's leadership. The following recommendations for further cooperation appear within this report.

- Purchasing cooperatives and joint purchasing arrangements should be fostered, especially for fuel, tires, parts, and other transportation-related supplies; instructional materials and supplies; office furniture; and janitorial supplies.
- Coordination with other area school districts should allow the Region XIX Educational Service Center to provide more frequent driver training courses. The periodic nature of present course offerings (three to four times during each school year) places a burden on all school districts that must hire drivers throughout the school year.
- Better coordination between local governmental agencies, including police departments, juvenile probation departments, protective services, and school districts, could improve the safety and security of district schools and the community in general. In addition to coordinating existing programs, these organizations should consider sharing a drug-detection dog to service several area school districts.

Exemplary Programs and Practices

TSPR identified numerous "best practices" in SISD. Through commendations in each chapter, this report highlights model programs, operations, and services provided by SISD administrators, teachers, and staff members. Other school districts throughout the state are encouraged to examine these programs and services to see if they may be adapted to meet their own needs. In addition to the programs noted in the Shared Services discussion above, other notable examples include the following:

- SISD is a stable district that enjoys the support of the community, local businesses, and parents. A sense of camaraderie and purpose makes SISD a highly desirable employer among area teachers, administrators, and other professionals.
- SISD is one of only a handful of school districts in Texas that has successfully implemented a year-round education (YRE) program districtwide. Under YRE, the standard 175-day instructional year is broken up by shorter vacation periods spaced throughout the year, rather than a traditional summer break. YRE maintains continuous learning programs for students; the multi-track YRE used in some SISD schools in which some students are in school while others are on vacation, allows for more efficient use of limited classroom space.
- While there are 61 school districts in Texas that provide some form of YRE, only two districts, Brownsville and Socorro, provide multi-track programs. Brownsville does not, however, provide YRE districtwide. According to a spokesperson from the Texas Education Agency, Socorro's YRE program is a flagship in Texas as it has been in operation longer with more success and less controversy than any other district in the state. The success of the program is largely due to an exhaustive planning effort that incorporated input from the entire community.
- As already noted, SISD's student performance is very good, with two exemplary campuses, three recognized schools, and 15 schools rated acceptable during the last school year, as measured by test scores on the mandatory Texas Assessment of Academic Skills (TAAS); no SISD schools were rated as low-performing. In addition, SISD has increased its passing rate every year since 1993.
- SISD's instructional technology is a special strength of the district. SISD has made significant investments in technology since the early 1990s, and today, the district's students and staff members have more than 12,000 e-mail accounts and access the Internet more than 72,000 times each day. The district offers about one computer for every 10 students, a ratio exceeding both the national average of 12 to one and the Texas average of 10.2 to one.
- SISD's "Dream Machine" is a mobile classroom funded by federal Title I grants that houses a library, two computer workstations, a television with VCR, a craft area, and a reading area. The Dream Machine travels throughout the district allowing community members to check out books, use computers, and participate in

activities designed to make young children comfortable with the classroom environment and help them get ready to start school.

- SISD's Special Education programs feature excellent, systematic prereferral strategies that minimize referrals to special education, as well as several programs designed to increase the inclusion of special education students in regular educational settings. The district's "Class Within A Class" model is a teaching arrangement in which students with similar disabilities are placed in the same general education classroom and co-taught by regular and special education teachers.
- SISD has numerous innovative and successful programs designed to prepare students for employment and higher education. For example, its Health Professions Academy is a four-year, in-school magnet program that was selected by the U. S. Department of Education as one of the nation's most innovative programs in 1994. The Naval Junior Reserve Officers Training Corps builds leadership and citizenship in participating cadets. Another example is Socorro High School's Media Production classes that develop communication skills and give students hands-on experience with broadcast quality equipment.
- SISD took advantage of the state's Instructional Facility Allotment program, which allows the state to pay portions of the debt service used to build qualified school facilities, and received \$1.3 million from the program for the 1998-99 school year.

Chapter by Chapter: Key Findings and Recommendations

District Organization and Management: Although SISD has placed certain of its planning efforts on hold pending the release of this report, it is important that the district move forward with a comprehensive long-range strategic planning process. The strategic plan should include a process for measuring progress toward its goals, direct ties to annual budgets, and a system of annual updates to keep pace with the district's changing needs.

Educational Service Delivery: The KEYS Academy, SISD's alternative education program that provides a disciplinary alternative to suspension or expulsion, should be upgraded to better meet the needs of its students and district personnel. At minimum, physical barriers should be erected to separate KEYS students from other students and administrators occupying parts of the KEYS facility. However, TSPR believes a complete overhaul of the program is in order if students entering the program are to succeed.

Personnel Management: SISD should undertake a careful analysis of its salaries to ensure that all employees are paid at appropriate levels for appropriate levels of work. Disparities among administrative classifications, high turnover rates in the Transportation Department, and technology-related departments indicate that a salary review is warranted.

Facilities Use and Management: In a fast-growing district like SISD, a long-range facility master plan and design development and construction standards are critical. Spot decisions have led to unnecessary expenses in some situations-costly errors that might have been avoided with long-range planning and a coherent set of standards from which to work.

Financial Management: SISD needs a better system of internal controls to ensure the safety of district assets. While TSPR noted no improprieties, the review team did find weak controls in some cash management practices, and flaws in the levels of authority given to individuals in the financial management function. SISD should correct these weaknesses and hire an internal auditor to continuously develop improvements in district operations.

Computers and Technology: SISD must replace a computer system that cannot operate correctly after the year 2000, due to a date-change problem that many older systems are encountering. Instead of simply replacing this system, SISD should use this opportunity to enhance various areas of district operations including such functions as attendance tracking, fixed-asset management, and purchase order and purchase requisition processing.

Furthermore, TSPR found that SISD lacks a disaster recovery plan for its computer functions and has no backup equipment on which to run critical applications such as payroll processing should its main systems fail. SISD should develop a backup plan and equipment solutions to ensure that district functions can continue in the event of a failure of its main computer systems.

Warehousing: SISD's warehouse inventory levels are unnecessarily high. For example, the district has a 120-year supply of ditto masters, a 23-year supply of acetate sheets for overhead projectors, and a 10-year supply of thermal masters for copying. SISD should sell off unneeded supplies, establish maximum and minimum inventory levels, and use automatic reorder points to bring this situation under control.

Transportation: SISD has been reluctant to provide transportation to children who face hazardous conditions in walking to school. In one example identified by TSPR, a previously denied route is eligible for state reimbursement, and potentially could even generate retroactive payments.

In the future, requests for hazardous routes should be brought to the board for consideration, and if approved, claims should be made to the state for reimbursement.

Also, SISD's bus fleet is aging, and its current bus replacement rate cannot meet the district's ever-expanding needs. To ensure the safety of the children riding those buses, SISD should immediately establish and fund a replacement schedule that ensures that all buses are replaced every fifteen years.

Safety and Security: Crime and discipline-related incidents are increasing along with SISD's student population. To meet this challenge, the district should develop a long-range plan providing for the continued safety and security of students and staff. This plan should include prevention, intervention, and enforcement activities and determine the appropriate mix of each needed by the district.

Savings and Investment Requirements

Many of TSPR's recommendations would result in savings and increased revenue that could be used by SISD to more effectively meet its students' needs. The savings opportunities identified in this report are conservative and should be considered minimums. Proposed investments of additional funds usually are related to creating an efficiency or savings or enhancing productivity and effectiveness.

As shown in **Exhibit E-2**, full implementation of the recommendations in this report could produce gross savings of almost nearly \$3.3 million over the next two years. SISD could achieve total net savings of more than \$6.3 million by 2002-2003 if all of TSPR's recommendations are implemented.

Exhibit E-2

Summary of Net Savings

Year	Total
1998-99 Initial Annual Net Savings	\$1,055,791
1999-00 Annual Net Savings	\$1,261,945
2000-01 Annual Net Savings	\$1,292,244
2001-02 Annual Net Savings	\$1,386,424

2002-03 Annual Net Savings	\$1,365,844
One Time (Costs) Savings	(\$27,749)
TOTAL SAVINGS PROJECTED FOR 1999-2003	\$6,334,499

Detailed implementation strategies, timelines, and estimates of fiscal impact follow each recommendation in this report. The implementation section associated with each recommendation highlights a series of actions needed to achieve results. Some should be implemented immediately, some over the next year or two, and some over several years.

TSPR recommends that the SISD board ask district administrators to review these recommendations, develop a plan to proceed with implementation, and monitor subsequent progress. As always, TSPR is available to help implement its proposals.

Exhibit E-3
Fiscal Impact of Recommendations

To obtain a copy of this exhibit, please contact the Texas Performance Review at 512/475-0332, or via e-mail at tspr@cpa.state.tx.us.

Chapter 1

District Organization and Management

This chapter reviews SISD's overall organization and management in four areas:

- A. Organizational Structure
- B. Vision, Planning, and Goals
- C. Accountability and Control
- D. Policies and Procedures

The effectiveness of a district's organization and management may be evaluated against six critical success factors: a clear direction with a single stated vision and goals; an efficient and logical organizational structure that supports site-based decision-making (SBDM); a planning, budgeting, and improvement process that ensures resources are used efficiently and support district goals; a thorough and objective performance evaluation system; sound and consistently applied policies that comply with applicable laws; and board actions that demonstrate their understanding of their role as planners, policy makers, and performance monitors.

SISD's organization and management must be evaluated in light of its rapid growth over the past decade. SISD's enrollment has doubled over the past ten years, and this growth brings challenges that many school districts do not have to face. The district is hiring constantly and builds new schools almost annually. During this period of growth, moreover, significant legislative changes have affected school district management, including SBDM. SISD also has implemented Year-Round Education

(YRE), another factor contributing to significant management and governance challenges.

Despite these challenges, SISD has been highly successful in managing its operations. SISD has implemented YRE at all schools. It has enjoyed consistent increases in student performance and is on the cutting edge of technology use in public education. It has developed a level of parent involvement to which other districts can only aspire, and has successfully managed rapid enrollment growth. These achievements are particularly noteworthy given that SISD is a low-wealth district.

Given these successes, it is not surprising that the community enthusiastically supports its school district. This support is a reflection of strong leadership and effective management. This support was evident in comments the review team received through surveys, interviews, and focus groups. For example, 96 percent of teachers and school administrators, 100 percent of district office staff and 73 percent of parents surveyed believe that the quality of SISD's education is good.

While district management is exceptional in many areas, this chapter identifies several opportunities for improvement. First, SISD's organizational structure, while lean at the top, is overstaffed at the departmental level in several areas. Second, SISD lacks a coordinated, long-range strategic planning effort. Third, SISD's board needs an internal audit function to address internal control and compliance issues. Finally, SISD's procedures are inadequately documented, a situation that inhibits its ability to improve processes and identify automation requirements.

BACKGROUND

SISD's board of trustees is responsible for planning, setting policy, and approving the district's annual budget. SISD is governed by a seven-member board of trustees serving alternating four-year terms. Five trustees are elected from single-member districts and two are elected at large. **Exhibit 1-1** lists the current board members and the district each represents.

Exhibit 1-1

SISD Board of Trustees

1997-98 School Year

Board Member, Title	District	Term Expires
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Hector Enriquez, President	3	1998
Craig A. Patton, Vice President	At-Large	1999
Juan Munoz, Secretary	1	2000
Bruce Truesdale	2	1998
Barbara Perez-Pena	At-Large	1998
Alex Vidales	5	2000
Guillermo Gandara	4	1998

Source: SISD

The board of trustees and superintendent form the district's "Team of Eight," a title for the district's leadership that reflects an organizational philosophy focused on teamwork and participative management.

SISD's board has four subcommittees to which board members are assigned based on their interests and experience. These committees are Finance, Human Resources, Instruction, and Student Services. Regular meetings of the board are scheduled for the first Tuesday of every month. Special meetings are scheduled as needed to address budget, tax rate, and personnel issues. Last year, the board held 12 regular meetings and seven special meetings. The average regular board meeting lasts approximately 2.5 hours. Board attendance at meetings is good, and most board meeting discussion occurs in open session. **Exhibit 1-2** shows the number, type

and length of meetings held by the SISD board in the last academic year.

Exhibit 1-2
Board Meeting Statistics
September 1996 through August 1997

Date (R indicates regular meeting; S a special meeting)	Number of Members Present	Total Length of Meeting(minutes)	Length of Split Sessions(minutes)	
			Open	Exec.
9/3/96-R	7	160	130	30
10/8/96-R	6	207	207	0
11/5/96-R	7	165	110	55
12/3/96-R	4	48	48	0
1/20/97-R	7	72	0	72
2/4/97-R	7	134	134	0
2/6/97-S	6	6	6	0
3/4/97-R	7	114	95	19
4/1/97-R	6	135	103	32
5/6/97-R	6	124	121	3
5/13/97-S	7	8	8	0
6/3/97-R	6	168	125	43
6/17/97-S	6	59	59	0
7/15/97-R	5	167	152	15
8/5/97-R	6	232	146	86
8/7/97-S	5	160	160	0
8/14/97-S	6	155	155	0
8/21/97-S	5	140	80	60
8/28/97-S	6	22	22	0
Totals		2,276	1,861	415

Percent of total meetings			82%	18%
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Source: SISD

SISD's board has a budget of \$51,734 for the 1997-98 school year, most of which is used for training and travel expenses. This budget is 10 percent lower than the prior year's budget.

The superintendent is the chief executive officer of the school district and reports to the board. SISD's superintendent, Don P. Schulte, assumed office in March 1997, after being the district's assistant superintendent for Instruction for more than seven years. The superintendent's role is to execute board policies and administer district operations. Specific responsibilities of the superintendent include planning, program and personnel evaluation, communication, budget recommendations, and consistent application of policies. The superintendent's office has a budget of \$234,610 for 1997-98. This is \$102,000, or 30 percent, less than the prior year's budget. This reduction is due primarily to the elimination of one position from the superintendent's office.

Chapter 1

Organizational Structure

CURRENT SITUATION

SISD has a carefully developed organizational structure that emphasizes teams rather than the traditional chain-of-command pyramid structure that governs most educational organizations.

In fact, SISD's organizational chart is drawn to reflect its team concept as a wheel (Exhibit 1-3). This concept has been in place for ten years, and reinforces the philosophy of a unified, team-oriented managerial style.

Exhibit 1-3

SISD Organization Chart

To obtain a copy of this exhibit, please contact the Texas Performance Review at 512/475-0332, or via e-mail at tspr@cpa.state.tx.us.

As the organizational structure shows, six assistant superintendents oversee district operations. Each is required to have a master's degree, a mid-management certification, and five years' experience as a school administrator.

SISD does not have an internal legal services support function; all legal work is contracted out. Historically, legal fees have been low (**Exhibit 1-4**).

Exhibit 1-4

SISD Legal Fees (All Funds)

1992-93 to 1995-96

Year	Amount	Percent Change
1992-93	\$76,821	n/a
1993-94	\$38,620	(50%)
1994-95	\$38,887	1%
1995-96	\$42,414	9%

Source: PEIMS

Complementing the formal organizational chart is the district's site-based decision-making plan, a state-mandated effort to decentralize authority in school districts and give more freedom to individual schools. SISD describes its SBDM plan in a handbook, "The Socorro Plan: An Opportunity for Excellence," which the district published in 1992.

SISD has embraced decentralization and strongly supports SBDM. The district's organizational structure provides adequate support for SBDM, and the district's staff seems committed to the concept.

Participant involvement in the district's SBDM structure is solicited through two primary groups. The School Improvement Team (SIT) committees are state-mandated committees for revising and improving the instructional elements of SBDM plans. These committees must have a combination of school-based professional staff, parents, businesses and community representatives. Teachers on the committee are elected by teachers at each school. Parents and community representatives may be selected by the principal. The other group, the Educator's Professional Advisory Council, is a committee of teachers and other school-based personnel involved in establishing and reviewing the district's educational goals, objectives, and instructional programs.

FINDING

Overall, SISD has been highly successful in its management of school district operations. One of its most notable achievements is its implementation of Year-Round Education. The district's planning process for YRE, which aggressively sought and used community input, is a model for all school districts to follow. SISD also has demonstrated consistent increases in student performance and has successfully implemented a variety of programs to improve student learning, including the Help One Student To Succeed (HOSTS) program for students reading below their grade level, a Career and Technology Academy for health occupations, and Project Recovery for teenage parents.

SISD's leadership and teachers also have developed a very positive relationship with members of the community. The district runs a highly successful public health clinic and several computer labs and makes these available to parents and others in the community. The district has a mobile classroom-the Dream Machine-that travels throughout the area offering students, parents, and others the opportunity to check out books and use computers. Through a variety of programs and initiatives, from parent rooms to "pajama parties," the district's schools have achieved an enviable level of parental involvement.

The district, moreover, is on the cutting edge of instructional and business technology. Every classroom has a computer connected to the Internet, and every school in the district is connected to the district's network.

Also, the district has successfully managed its rapid growth experienced over the past decade through successful bond issues and the recruitment of highly qualified managers, teachers, and employees.

The district's success stems from a combination of strong leadership and a very positive relationship with the community. The district has benefited from superintendents and board members who work well together and are able to rally support for their goals. They have succeeded in building a strong base of support within the community. All of these elements have assisted in increasing involvement and trust in the district and its leadership.

COMMENDATION

SISD has been successful in its management of school district operations and in building a district that is viewed very positively by the community.

FINDING

SISD has a relatively flat and effective organizational structure and successfully fosters a team environment among its staff. Eight positions-six assistant superintendents and two support personnel-report directly to the superintendent. Many school district structures are more hierarchical, with fewer assistant superintendents and unnecessary layers of management.

In interviews, managers at various levels in the organization talked about their commitment to the district and displayed a strong sense of association with the district. The organizational structure provides an adequate infrastructure for SBDM, and decentralization is a strong theme throughout SISD.

With exceptions in certain departments, this management structure also contributes to lower overall central administration costs. SISD is second-lowest among its peer districts in central administrative costs per student (**Exhibit 1-5**).

Exhibit 1-5

Central Administrative Cost Per Student Comparison

1996-97 School Year

School District	Central administrative costs per student
Southwest ISD	\$213
Pharr/San Juan/Alamo ISD	\$176
Ysleta ISD	\$173
El Paso ISD	\$172
Laredo ISD	\$172
United ISD	\$172
Socorro ISD	\$143
Edinburg ISD	\$141

Source: AEIS 1996-97 Finance Data, Socorro ISD and Peer Groups.

COMMENDATION

SISD's organizational structure supports the district's team concept without unnecessary administrative levels.

FINDING

The review team found significant variances in the scope of responsibility and authority given directors and coordinators throughout the district.

SISD uses a methodology supplied by the Texas Association of School Boards (TASB) to rate its jobs. This methodology considers eleven criteria including number of people supervised, size of budget supervised, minimum qualifications, decision-making authority, conflict resolution responsibility, and amount of contact with the public. The review team believes these are valuable criteria to consider in rating jobs and setting salaries, but found that some of the district's management positions—specifically coordinators and directors—do not appear to have consistent levels of responsibility.

In Human Resources, for example, one assistant superintendent and five directors supervise a staff of 21. Human Resources has directors for each of its functional areas, including Records Management, even though the director of Records Management has no staff to manage. By contrast, the coordinator of Transportation oversees more than 150 employees, yet the position is on a lower pay scale than the directors. In Security Services, the coordinator manages 50 employees.

Exhibit 1-6 outlines the duties of several of the district's coordinators and directors.

Exhibit 1-6

Range of Coordinator and Director Duties

Position	Duties
Security Coordinator	<ul style="list-style-type: none"> • Supervises 50 people including attendance officers and security • Manages budget of \$722,975 • Oversees capital equipment inventory including 23 vehicles
Transportation Coordinator	<ul style="list-style-type: none"> • Supervises 152 people • Manages budget of \$2.84 million • Oversees capital equipment inventory including 106 buses and 118 support vehicles
Director of Records Management	<ul style="list-style-type: none"> • Supervises no staff • Manages budget of \$106,319 • Oversees no capital inventory
Director of Facilities	<ul style="list-style-type: none"> • Supervises 130 people • Manages budget of \$10.89 million • Oversees capital equipment inventory including 81 vehicles
Food Services Director	<ul style="list-style-type: none"> • Supervises 194 people including supplemental staff • Manages budget of \$5.7 million • Oversees capital equipment inventory including eight vehicles and \$1.2 million in kitchen and office equipment

Source: SISD

While job ratings reflect factors other than supervisory responsibility and budget size, TSPR found no evidence that these other factors justify some of SISD's current job ratings.

Recommendation 1:

Reclassify managerial positions to reflect a consistent level of responsibility.

The district should review job descriptions, job responsibilities, and scope of authority to reclassify coordinator and director positions for greater consistency.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Human Resources reviews job descriptions for coordinators and directors and compares scope of authority and qualifications for existing personnel.	April 1998
2	The assistant superintendent for Human Resources reclassifies coordinator and director positions to achieve more consistency in responsibility and authority across the district.	June 1998
3	In the planning stages of the next budget cycle, compensation for coordinators and directors is adjusted to reflect reclassifications.	July 1998

FISCAL IMPACT

Reclassifying coordinator and director positions may result in significant variance of salaries, but the overall fiscal impact cannot be determined until all reclassifications are identified. SISD should seek to implement reclassifications that offset each other from a fiscal standpoint.

FINDING

SISD applies formulas to determine appropriate staffing levels in schools, but not in all of its administrative departments. For example, additions to the custodial staff are based on a formula driven by the number of teachers, pupils, classrooms, square feet of buildings, and acres of grounds. School administrative positions also are guided by formulas; the number of assistant principals, counselors, librarians and nurses are driven by the type of school and its enrollment. Food Services uses trays per labor hour to determine its staffing levels.

Other departments, however, such as Human Resources, base their staffing and management levels on perceived needs rather than on some productivity formula, such as the number of total employees served per Human Resources employee. New positions in these departments are justified by growth, but SISD appears to have no review method to determine whether their staffing levels are appropriate. Findings related to staffing levels in specific functional areas are discussed throughout this report.

The district notes that the multi-track YRE program makes the two week break in July very intense. In fact, June and July are extremely labor intensive since all contracts are finalized during this time. In a traditional setting, most personnel functions have all summer to complete this process.

Recommendation 2:

Conduct organizational staffing analyses annually to ensure appropriate staffing and management levels throughout the district.

The Human Resources Department should collect information about the staffing levels of its peer districts and those recommended by industry standards. All departments should compare their staffing to these benchmarks annually.

Instead of staffing for peaks the district should look for ways to supplement staff during the months of June and July.

The Finance Department also should develop a process for departments to use in justifying requests for additional staffing. The department then should train coordinators and directors on how to use these measures and benchmarks to determine their need for additional positions, and on how to demonstrate that the benefits of additional staff, such as increased productivity or faster processing, outweigh the cost.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Human Resources develops a historical comparison of staff levels by department for the previous five years.	April 1998
2	The assistant superintendent for Human Resources and department heads work together to research staffing formulas and staffing levels in peer districts.	June 1998
3	The assistant superintendent for Finance develops a budget justification process designed to require division heads to explain and defend their needs for additional spending, including more staff.	September 1998
4	The assistant superintendent for Human Resources and the assistant superintendent for Finance develop a training program for coordinators and directors on budget requests.	October 1998

FISCAL IMPACT

This recommendation can be implemented within existing resources.

FINDING

While SISD has demonstrated a considerable commitment to SBDM, SISD's SBDM plan does not provide adequate structure and guidance to allow the district to maximize the benefits of SBDM.

The SBDM plan, The Socorro Plan, is divided into six sections, each of which describes one of the plan's components. The six components are:

1. Commitment to Improved Outcomes for All Students
2. Collaborative Structure and Process
3. Statement of Purposes for SBDM
4. Decentralization Parameters
5. Adequate Time, Ongoing Human Resource Development and Technical Support
6. Procedures for Planning and Evaluating the Decision-Making Process

For each component, the plan provides a brief description and supporting, explanatory documentation. This plan meets the minimum requirements of state law, but while some components are sufficiently complete, others are not. In all, the plan provides little practical guidance or structure for implementation. It does not explain how schools should coordinate services, how they should communicate to ensure they provide student services equitably, or how they should ensure that they operate within district policies and state law.

For example, the section addressing the district's commitment to improved outcomes for all students includes a description of the process and data that will be used to evaluate the effectiveness of each school and sample pages describing a school improvement process. This provides sufficient detail regarding the evaluation of schools.

Other components, however, are less complete. For example, the component on decentralized parameters lists the ten general responsibilities of the School Improvement Teams and the seven responsibilities of the Educator's Professional Advisory Council, but does not include any description of which decisions are best handled by the

schools individually, which are best handled by the schools collaboratively, and which are appropriate for the central administration.

The component regarding procedures for planning and evaluating the decision-making process also is inadequate. The section has only three paragraphs. The first paragraph presents the state's expectations. The second refers the reader to district policies on planning, scheduling, and conducting SBDM meetings and events. The final paragraph describes several methods for evaluating schools-school improvement plans, Effective Schools Evaluation Study, AEIS reports, and principal evaluations-but does not include any methods for evaluating SBDM's effects on the district as a whole. The plan does not describe any methods for ensuring that district policies are followed, assessing the effectiveness of programs at the district level, ensuring that the use of district resources is coordinated and efficient, or for ensuring that students and staff are treated consistently across the district. The plan also does not include the district's mission or goals.

Because of this lack of guidance, the effectiveness of SBDM varies dramatically across SISD's schools and programs. This inconsistency can be seen in several areas. For instance, some members of SIT teams report problems with adequate representation on teams and inappropriate team action. In the absence of district oversight, these concerns often are not addressed.

Moreover, inadequate guidelines can lead to poor coordination and communication. For instance, staff at one school failed to contact Security Services when they used the facility on weekends. Although administration leadership has advised school staff of the need to report weekend visits, they do not do so consistently, and on at least one such occasion, unsupervised students vandalized the school.

Another example regarding safety and security involves the inconsistent treatment of student disciplinary actions. Unfortunately, inconsistencies in discipline and alternative education referral increases the risk of parent-district litigation and does not support the goal of a safer school environment.

On the positive side, SISD maintains excellent coordination between its schools and the Transportation Department. Schools work closely with Transportation and have developed a process to coordinate bell times to achieve efficient student movement for regular schedules and special events. In this case, schools, students, and the central transportation administrative offices appear to work closely and all benefit from the coordinated effort.

Recommendation 3:

Update the site-based decision-making plan to provide schools with additional structure and guidance.

A useful SBDM plan should include the district's mission and goals, recommended areas for coordination, and methods for evaluating district progress toward its goals, ensuring compliance and efficiency throughout the district, and facilitating coordination and communication among schools.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Strategic Planning convenes a team with broad representation from the district's schools, programs, and departments to revise the district's SBDM plan.	April 1998
2	The team reviews peer district SBDM plans and searches for examples of complete and detailed SBDM plans across the state.	May 1998
3	The team produces the revised SBDM plan and distributes the report to each district school, all administrators, the board, and parent groups.	July 1998
4	The assistant superintendent for Strategic Planning develops a "SIT handbook" to assist school-based decision-makers in their annual assessment and improvement efforts.	August 1998
5	The assistant superintendent for Strategic Planning develops and delivers training for school-based decision-makers preparing to work on a SIT.	October 1998

FISCAL IMPACT

This recommendation can be implemented within existing resources.

Chapter 1

Vision, Planning, and Goals

CURRENT SITUATION

The district is guided by five priority goals set by the superintendent (**Exhibit 1-7**).

Exhibit 1-7

Superintendent's Priority Goals 1997-98

Priority Goals
1. To improve student performance as measured by an array of indicators.
2. To expand community and staff involvement in decision making.
3. To increase the use of technology in support of learning and district operations.
4. To ensure that all district resources are used prudently and efficiently.
5. To promote an atmosphere characterized by service to and respect for others.

Source: 1997-98 District Plan

Each department is responsible for developing its own goals based on the superintendent's goals. For example **Exhibit 1-8** presents the goals of the Department of Instruction.

Exhibit 1-8

Departmental Goals Supporting Superintendent Goals

Department of Instruction Goals
1. To improve academic performance of all students as measured by TAAS, other standardized tests, and student portfolios; to increase enrollment in advanced classes; and to reduce student failure and dropout rates.
2. To continue to promote and expand meaningful community and

parental involvement in the education of all students.

3. To support and implement programs and activities to foster caring and learning organizations that respect the dignity and worth of all people.

Source: 1997-98 District Plan.

FINDING

While SISD has a Strategic Planning Department, it does not have a true strategic plan or a coordinated approach to planning and goal setting. It is important to note, however, that the current superintendent came into this position only days before the performance review was announced. He has consequently placed all strategic planning efforts on hold pending the release of this report.

While the district has the superintendent's priority goals and while these goals are supposed to drive goal setting and planning for departments and schools, the district has no method for guiding or coordinating its decision-making and no districtwide plan. This is not to say that SISD has not had successful planning efforts; the Blue Ribbon Committee and Blueprint for the Twenty-First Century Committee are notable examples of diverse interests working together to discuss challenges facing the district. The Blue Ribbon Committee was created in October 1993 to study the district's rapid growth and explore ways to meet its facility needs. The committee produced a final report that included a description of the district, trends and projections affecting its future, and alternatives for managing the growth and changes.

The Blueprint for the Twenty-First Century Committee was recently created to study attendance boundaries and grade-level configurations and to maximize the benefits of multitrack year-round education. It is important to note that most administrators and board members consider the work of this committee will result in a districtwide plan of action, however, the Twenty-First Century Committee is on hold pending the release of this report.

The assistant superintendent for Strategic Planning is not involved in many of the district's planning efforts. For example, of four significant planning efforts recently undertaken by the district-the planning and construction of the Aquatics Center, the process of projecting enrollment and building schools, and the preparation of the district improvement plan and YRE plan-the assistant superintendent was only involved in preparing the plan for YRE.

The assistant superintendent for Strategic Planning's job description includes responsibilities for developing program evaluation and procedures; developing innovative ideas; and planning, implementing, and evaluating the district's YRE program. Strangely, the job description does *not* include responsibility for developing a strategic plan.

The absence of a single plan and a coordinated approach to planning has led to unconnected planning efforts, which in turn have resulted in problems for the district. For example, SISD has attempted to address substantial enrollment increases by building additional schools. Unfortunately, these schools are reaching their capacity immediately after opening. When SISD projected five-year enrollment rates in 1991, it accurately predicted enrollment levels for 1996. Since the district did not refer to these projections in building its schools, though, it lacked adequate space to house its students in 1996.

Recommendation 4:

Develop a long -range strategic plan and coordinate *all* planning efforts through the assistant superintendent for Strategic Planning.

The assistant superintendent for Strategic Planning should activate the Blueprint for the Twenty-First Committee made up of community members, business leaders, parents, students, and district staff members to develop a strategic plan. This group should have an expanded purpose and begin by assessing the district's current situation and by identifying factors that will affect the district in the future. The group then should use the superintendent's priority goals as a starting point.

Once the plan is developed, the district should develop processes for measuring progress toward its goals and for reviewing and updating the plan annually. The group should also develop a method of documenting how districtwide goals are supported by department and school goals.

The district also should develop a policy requiring the assistant superintendent of Strategic Planning to be informed of all planning efforts in the district, thereby ensuring the coordination and consistency of planning efforts.

SISD's superintendent also should revise the job description for the assistant superintendent for Strategic Planning to include coordination of district planning efforts and development of a strategic plan.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent and the assistant superintendent for Human	April 1998
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	Resources develop a new job description for the assistant superintendent for Strategic Planning.	
2.	The assistant superintendent for Strategic Planning convenes a committee to develop an integrated strategic plan for the district.	May 1998
3.	The committee conducts an assessment of the district and identifies factors that will affect the district in the future.	July 1998
4.	The committee assesses the current lists of goals and visions and develops a single vision statement and a single set of goals.	August 1998
5.	The committee develops a strategic plan.	August 1998
6.	The committee establishes an ongoing process for evaluating district goals and measuring progress toward their achievement.	September 1998
7.	The committee establishes a mechanism for documenting how department and school goals support the districtwide goals and plan.	September 1998
8.	The board develops a process to ensure that all planning decisions go through the assistant superintendent for strategic planning to ensure coordinated planning efforts.	September 1998

FISCAL IMPACT

This recommendation can be implemented within existing resources.

Chapter 1

Accountability and Control

CURRENT SITUATION

The Academic Excellence Indicator System (AEIS) is a statewide information system for school districts that can assist school boards in holding district managers accountable for results. AEIS provides selected student performance, financial, and staffing data on an annual basis.

Each year, an outside accounting firm audits SISD's financial statements. This audit provides a degree of accountability by telling the board whether or not the district is in compliance with accounting principles and federal guidelines. The audit also compares actual to budgeted expenditures.

The single most important element of accountability and control is the district budget. The SISD board approves a budget each August and receives monthly updates comparing actual spending against budgeted amounts. (The budget process is discussed further in the Financial Management chapter of this report.)

Exhibit 1-9 describes several other major reports provided before or at each regular board meeting that support accountability.

Exhibit 1-9

SISD Reports

Report	Description
Friday reports	The board receives packets every Friday for information purposes, and before each regular and special board meeting to inform them of issues to be discussed at the meeting.
Financial report	This report is a monthly financial statement showing the assets, liabilities, and fund balances of the school district.
Tax report	This report compares tax collections against amounts due.
Academic statistics	The district provides some statistical information to the board relating to student achievement test scores, dropout rates, and other data throughout the year.

Source: SISD.

Other management reports, such as a construction report or other special projects, are produced on an as-needed basis.

FINDING

The board does not receive adequate information to evaluate SISD's efficiency. The board receives reports on district finances, taxes, construction, and various other areas in their board meeting preparation packets. However, while these reports are accurate, they do not include sufficient information on the district's financial status, progress, or productivity.

For example, the board receives very little financial or staffing information on a per-unit basis. Per-unit measures such as food services cost per meal, transportation costs per mile, and number of employees per students served are important for judging productivity.

Also, during 1996-97, the board did not receive any long-term trend analysis of historical information. The proposed budget provided to the board includes only the most recent year's information and does not provide any per-unit data for evaluating efficiency. Trend analyses of per-unit data are important to identify unusual fluctuations in spending patterns that may not be noticed during a review of total dollar amounts, especially in a fast growth district like SISD.

In addition, during 1996-97, the board did not receive any peer-district comparisons of key financial and efficiency data. While these data serve only as a benchmark, they are useful in identifying areas where spending may be excessive or inadequate.

Recommendation 5:

Develop performance reports for the board to improve district accountability.

The assistant superintendents should develop performance measures and reports for their departments. These measures should be developed as part of the strategic planning process and should be linked to the goals established as part of that process. The measures should reflect progress toward these goals.

To be effective, performance measures should be objective. **Exhibit 1-10** presents possible reporting measures the district could use to report performance to the board. These measures are particularly useful when viewed over a period of several years.

Exhibit 1-10

Sample Performance Measures

Area	Performance Measures
Board	Student test scores Percentage of time spent in executive session
Superintendent	Student test scores Per student expenditures by functional area Staff-to-student ratio by functional area Amount of funds generated from community
District Administration	Annual cost of overtime Administrative cost as a percent of total cost Projected vs. actual enrollment
Principals	Student test scores Percent of parents attending parent-teacher conferences Number of hours individuals volunteer at the school Teacher attendance Student attendance
Teachers	Student test scores Percent of parents attending parent-teacher conferences Teacher attendance Student attendance
Custodians / Engineers	Attendance Annual cost of overtime Number of square feet per custodian
Transportation	Percent of on-time arrivals Number of routes Cost per mile Cost per student transported
Food Services	Participation rates Meals per labor hour

Source: Neal & Gibson

Once the measures are identified, the departments must define how each measure will be calculated.

The assistant superintendents should present these reports to the board at least annually as part of the budget process, or more frequently if the board desires.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendents develop draft performance reports and measures for each functional area in their departments that are tied to their department's goals and the district's strategic plan.	April 1998
2.	The assistant superintendents develop data-collection procedures to collect and track the data.	April 1998
3.	The assistant superintendents collect trend and peer data to support the draft performance measures.	May 1998
4.	The board, the assistant superintendents, and the superintendent review the analyses to evaluate the relevance of specific measures.	June 1998
5.	The superintendent finalizes the performance measures and presents reports during the budget development process.	June 1998

FISCAL IMPACT

This recommendation can be implemented within existing resources.

FINDING

SISD has no internal audit department to ensure that its funds are managed appropriately. Without an internal auditor, it is difficult for the district to efficiently respond to board requests or concerns, to identify internal control problems, and to protect itself against theft.

Developing a good internal audit function begins with several essential elements. First, the internal auditor, with assistance and guidance from the board, typically identifies areas within district operations of high and low risk. This includes, identifying areas where the potential for problems is the greatest. Next, the district develops an audit plan that defines the cycle by which audits should be conducted. This plan will specify which audits should be conducted in which years. Areas of high risk are assessed first and more frequently than areas of low risk. Then, the district develops an audit program that defines how each type of audit should be conducted. This program includes steps to be taken and data to be analyzed. Finally, the board and the internal auditor develop report formats in which to present the findings.

Several problems identified in this report could have been detected through an internal audit process. These include the lack of written procedures; failure to follow school district purchasing procedures; improper access to personnel records; and other internal control problems. For instance, the Finance Department does not always review the

reasonableness or accuracy of some districts bills. Such omissions put the district at risk and could have been identified by an internal auditor.

Four of SISD's peer districts of similar size were contacted and asked whether they had an internal audit function. All four have an internal audit function (Exhibit 1-11) and three peers employ an internal auditor in house.

Exhibit 1-11

Peer Districts With Internal Audit Departments

District	Internal Audit Function	Number of Internal Audit Employees	1996-97 Enrollment
United	Yes	4	21,387
Pharr/San Juan/Alamo	An accountant performs these duties, but reports to the Business Manager (not to the Board)	1	20,362
Edinburg	Yes	1	19,153
Laredo	Yes	1	22,987

Source: Phone interviews with United ISD, Pharr/San Juan/Alamo ISD, Edinburg ISD, and Laredo ISD

Recommendation 6:

Create an internal auditor position that reports directly to the board.

The board should develop a set of expectations and a mission for the internal auditor. Based on these expectations and mission, the district then would develop a job description for the position and an internal audit plan.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board authorizes the creation of an internal audit position and identifies its specific responsibilities.	April 1998
2.	The superintendent incorporates the internal audit position into SISD's budget.	June 1998
3.	The Human Resources Department develops a job description	June 1998

	for the position based on board input.	
4.	The district develops the audit plan (including the risk assessment, the audit plan, the audit programs, and report formats).	June 1998 - August 1998
5.	The Human Resources Department fills the position.	July 1998
6.	The internal auditor begins implementation of the audit plan.	August 1998

FISCAL IMPACT

This fiscal impact assumes that the internal auditor would be hired at a Professional 4 pay grade. This pay grade is halfway between a staff accountant and the accounting director. The minimum annual salary for a Professional 4 position is \$38,002. Once benefits are included, this new position would cost the district \$42,652 per year.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Create an internal auditor position.	(\$42,652)	(\$42,652)	(\$42,652)	(\$42,652)	(\$42,652)

Chapter 1

Policies and Procedures

SISD receives regular updates on state-mandated policies from the Texas Association of School Boards. A reference copy of the SISD policy manual is kept at the superintendent's office, and the coordinator or director of each department is responsible for inserting policy updates in his or her own copies.

In addition to tracking and implementing these state-mandated policies, SISD reviews and implements administrative regulations. These regulations provide the practical "how-to" information about implementing policy within the district. Administrative regulations must be approved by the superintendent, but, as with policies, they are updated by individual departments and divisions. Each department and division has discretion in developing, updating, and implementing its own operating procedures.

FINDING

SISD's policy manual is not kept current. Although the district subscribes to the policy service offered by TASB and receives regular updates through this service, the updates are not added to the policy manual in a timely fashion and the district seems to lack any controls to ensure that they are added at all.

Under the existing process, TASB sends regular policy updates to the SISD superintendent's office. The office copies the policies. One copy is kept in a reference manual in the office, and another is sent to the relevant department. The department then reviews the policy with its committee to determine whether it is relevant to SISD. Once the policy has been reviewed, it is presented to the board for approval. This process can take three or four months, and SISD appears to have no way of knowing which new policies are still waiting to be incorporated into the policy manual.

TSPR identified several instances in which SISD policies are not consistent with changing legal requirements. For example, some purchasing policies must be updated to reflect recent changes in law. SISD policy CH prescribes six options for district contracts above \$25,000. The 1997 legislative session, however, added two more options. Policy CH is dated April 1, 1997. It appears that the district is not updating its policies promptly.

Moreover, several of SISD's administrative regulations are outdated, particularly those affected by YRE. For example, the district's

administrative regulation for school staff allocations is dated 1992, before YRE was implemented, and does not consider important issues such as YRE's impact on staff allocations.

In recognition of this problem, SISD has decided to put the manual on-line. The policies have been entered and indexed as computerized documents and the MIS department is in the process of converting these documents so that they can be accessed through the Internet.

The Superintendent's Office has begun developing procedures to support this new on-line manual. While these procedures have not yet been written, it appears that the basic process will be the same. TASB policy updates will be sent to the Superintendent's Office, which will determine which policies are relevant to SISD, with the help of the appropriate assistant superintendent if needed. The Office will type up the relevant updates and pass them along to the appropriate assistant superintendent, who will review the policy, make any necessary revisions or additions, and present it to the board for approval. Once the board has approved the policy, it will be made available on-line.

This process includes only one change from the current situation. The Superintendent's Office hopes that typing the policy update and highlighting its changes before passing it along to the appropriate assistant superintendent will speed up the process. While this should help the process move more quickly, and while putting the policy manual on-line should help to make current policy easier to access by SISD personnel, it is not clear that the new procedures will include steps for monitoring policy updates to ensure they occur in a timely fashion.

Recommendation 7:

Centralize control of policy manual updates in the Superintendent's Office and set up a system to ensure that updates are made in a timely fashion.

When developing procedures to support the new on-line manual, the Superintendent's Office should ensure that the procedures include a method for tracking updates from their arrival in the district through board approval and their eventual addition to the on-line manual. The office also should consider instituting a requirement that TASB policies be presented at the next appropriate board meeting following their receipt.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Superintendent's Office develops processes and procedures that	Anril
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	streamline the policy update process and ensure that all policy updates are made in a timely fashion.	1998
2.	These procedures are documented and distributed to all assistant superintendents.	April 1998

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

Some SISD departments do not have complete, up-to-date, documented operating procedures. Each assistant superintendent is responsible for maintaining policies and administrative regulations in his or her respective area, but they are not required to have documented procedures. **Exhibit 1-12** describes the status of procedures in each SISD department.

Exhibit 1-12

Assessment of SISD Department Operating Procedures

Department	Assessment of Procedures
Human Resources	Only guide is Employee Handbook - no other documented procedures
Finance	Yes - but need updating
Facilities	Yes - in process of being updated for automation
Purchasing	Yes - but not updated since purchasing was automated
Food Services	Some - but not complete
Transportation	Recently updated
Community Involvement	Yes
Safety and Security	Some - but not complete

Source: SISD Interviews

While the district has training videos for new employees and other orientation programs, the lack of up-to-date procedures limits the district's ability to transition in new employees, cross-train existing employees, and to evaluate the efficiency of its processes. Furthermore, properly written procedures provide better support for performance evaluations, thereby

reducing the district's risk when it becomes necessary to terminate a poor performing employee.

Recommendation 8:

Develop documented operating procedures for all departments and ensure they are kept up to date.

Departments should prepare their procedures, but the Superintendent's Office should review them on a regular basis to ensure they are kept up to date. Procedures should include process flow diagrams as well as verbal directions.

The district would benefit from documented procedures, and the process for developing these procedures would be beneficial in itself. This process would require departments and individuals to carefully examine their processes and activities, the first step toward streamlining and improving them. It would, for instance, help departments identify areas in which automation could make their operations more efficient. Such opportunities for automation should be documented so that they can be incorporated into the district's business software.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent drafts an administrative regulation stating that all assistant superintendents will be required to maintain up-to-date, documented operating procedures.	April 1998
2.	Each assistant superintendent documents or updates operating procedures that affect their area to reflect changes in policy and administrative regulations.	December 1998
3.	The Superintendent's Office confirms that all procedures are documented and up to date.	Annually

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

Chapter 2

EDUCATIONAL SERVICE DELIVERY AND STUDENT PERFORMANCE

This chapter examines the equity and effectiveness of SISD's educational delivery system, including its regular and special education programs, in eight sections:

- A. Student Performance
- B. Instructional Administration and Management
- C. Bilingual Education/English as a Second Language
- D. Special Education/Dyslexia
- E. Compensatory Education/Title I
- F. Career and Technology Education
- G. Gifted and Talented Education
- H. Alternative Education

SISD has many outstanding and innovative academic programs. These programs, however, face three significant challenges: the rapid growth of the district's student population; inadequate evaluation mechanisms for special educational programs; and SISD's lack of long-term strategic planning for instructional services.

CURRENT SITUATION

In 1996-97, SISD enrolled 20,115 students in 23 schools, including three high schools, five middle schools, one alternative school, and 15 elementary schools (**Exhibit 2-1**). The district has 2,353 permanent employees, of whom 1,301 (55 percent) are classroom teachers. Seventy-seven percent of these teachers hold a bachelor's degree; 21 percent have a master's degree; .6 percent hold a doctorate; and about 1 percent hold no degree. The remaining 1,052 district employees are auxiliary employees (61 percent), teacher aides (12 percent), field administrators (6 percent), central administrators (2 percent), and elementary/secondary counselors, librarians, and other support personnel (19 percent).

Exhibit 2-1

SISD Schools and Enrollment

1996-97 School Year

School	Level	Enrollment
Montwood	High	2,723
Socorro	High	2,224
Slider	Middle	1,327
Helen Ball	Elementary	1,249
Cooper	Elementary	1,095
Americas	High	1,075
Martinez	Elementary	1,031
Clarke	Middle	977
O'Shea	Elementary	974
Sanchez	Middle	965
Socorro	Middle	924
Sierra Vista	Elementary	923
Rojas	Elementary	894
Horizon Heights	Elementary	810
Vista del Sol	Elementary	783
Campestra	Elementary	762
Hilley	Elementary	745
Escontrias	Elementary	641
Escontrias	Early Childhood	624
Hueco	Elementary	540
KEYS Academy	Alternative	82
Montwood	Middle	NA
Chavez	Elementary	NA

Source: PEIMS

About 89 percent of SISD's students are Hispanic, 9 percent are Anglo, 1 percent are African-American, and about one-half percent are from other ethnic backgrounds (**Exhibit 2-2**).

Exhibit 2-2

SISD Ethnicity of Student Population

1996-97 School Year

Ethnicity	Number	Percent
Hispanic	18,785	89.0
Anglo	1,953	9.3
African-American	251	1.2
Asian/Pacific Islander	81	0.4
Native American	28	0.1

Source: AEIS

For comparative purposes, the district identified seven "peer" districts with similar characteristics to SISD, including enrollment, demographic characteristics, and/or similar economic resources. The peer districts include the Edinburg, Pharr-San Juan-Alamo, Southwest (near San Antonio), United, Ysleta, Laredo, and El Paso school districts. (Although Ysleta and El Paso are significantly larger than SISD, they are in close geographic proximity and have similar student demographics.) The review also compared some SISD data to statewide and regional data.

Texas students who are eligible for free or reduced-price meal programs are considered to be "economically disadvantaged"; 70.4 percent of SISD's students fall in this category. This share is 22.3 percent higher than the state average, but falls in the middle of SISD's peer districts (**Exhibit 2-3**).

Exhibit 2-3

Percent of Economically Disadvantaged Students

SISD vs. Texas and Peer Districts

1996-97 School Year

District	Percent
Statewide	48.1
El Paso	67.2

Ysleta	68.1
United	70.1
Socorro	70.4
Southwest	74.0
Edinburg	86.2
Laredo	86.6
Pharr-San Juan-Alamo	87.0

Source: AEIS

FINDING

Several innovative SISD efforts to improve student performance contribute to the district's overall efficiency including year-round education (YRE), combination school programs, and vertical teams.

SISD has implemented YRE, which breaks the standard 175-day instructional year with shorter vacation periods spaced throughout the year, rather than the traditional long summer break. YRE is intended to maintain continuous learning throughout the year. "Multi-track" YRE refers to an administrative arrangement that divides the student population into groups, some of which are in school while others are on vacation, thus allowing for a more efficient use of limited classroom space. SISD uses a multi-track YRE system for its elementary and middle schools and a single-track YRE for its high schools.

While there are 61 school districts in Texas that provide some form of YRE, only two districts, Brownsville and Socorro, provide multi-track programs. Brownsville does not, however, provide YRE districtwide. According to a spokesperson from the Texas Education Agency, Socorro's YRE program is a flagship in Texas as it has been in operation longer and has operated more successfully and with less controversy than any other district in the state.

SISD has also adapted well to its dramatic increase in enrollment, which is expected to double again over the next 20 years. Two particularly innovative schools that opened in the summer of 1997 are Montwood Middle School and Chavez Elementary School. These schools are actually housed in one large building. Individuals submitting their applications for the principal positions of these two schools were required to develop a plan for the schools and present it to the recruitment committee. The principals who were eventually hired have a science, math, reading, and technology focus and call the combined middle and elementary schools

the S.M.A.R.T (science, mathematics and reading, technology) Academy. By developing a plan prior to the opening of the schools, the principals stated that they were able to focus on the implementation of the plan's instructional strategies from the first day of classes.

Finally, SISD is moving to vertical alignment and vertical teams, a system that teams students and administrators from elementary and middle schools with their feeder high school to ensure that the curriculum is coherent from school to school and across grade levels.

COMMENDATION

SISD has applied innovative ideas to improve the efficiency and effectiveness of its instructional programs.

Chapter 2

Student Performance

BACKGROUND

Texas student performance is measured by scores on the mandatory Texas Assessment of Academic Skills (TAAS), the Enhanced Test of the American College Testing Program (ACT), the Scholastic Aptitude Test (SAT), and other tests. Like all Texas districts, SISD is required to publish an annual report describing its educational performance by the indicators of the state's Academic Excellence Indicator System (AEIS). AEIS indicators include student attendance, dropout rate, percent of students taking advanced placement exams, percent of graduates completing the Recommended High School Program (which consists of 4 credits in English, 3 credits in mathematics and science, 3.5 credits in social studies, .5 credit in economics, 2 credits in foreign language, .5 credits in health, 1 credit in fine arts, 1.5 credits in physical education, 1 credit in technology applications, and .5 credit in speech), and the cumulative percentage of students passing all parts of the TAAS exit-level exam. Based on this information, districts and schools then are rated Exemplary, Recognized, Academically Acceptable, or Academically Unacceptable. In 1996-97, SISD had two exemplary schools, three recognized schools, and 15 schools with a rating of acceptable (Exhibit 2-4). KEYS Academy, an alternative education program, was not rated and two schools, Montwood Middle School and Chavez Elementary, opened in summer 1997 and so were not rated in 1996-97.

Exhibit 2-4

Accountability Ratings of SISD Schools

1996-97 School Year

School	Rating
Vista del Sol Elem	Recognized
Hilley Elem	Recognized
Martinez Elem	Recognized
Montwood MS	Not Rated in 1996-97
Chavez Elem	Not Rated in 1996-97
Campestra Elem	Exemplary
O'Shea Elem	Exemplary

KEYS Academy	Alternative Ed.
Cooper Elem	Acceptable
Sanchez MS	Acceptable
Socorro HS	Acceptable
Americas HS	Acceptable
Escontrias ECC	Acceptable
Hueco Elem	Acceptable
Escontrias Elem	Acceptable
Sierra Vista Elem	Acceptable
Helen Ball Elem	Acceptable
Slider MS	Acceptable
Clarke MS	Acceptable
Rojas Elem	Acceptable
Horizon Heights Elem	Acceptable
Socorro MS	Acceptable
Montwood HS	Acceptable

Source: AEIS

FINDING

Exhibit 2-5 compares the percentage of students in SISD and Texas as a whole who passed the Texas Assessment of Academic Skills (TAAS) reading, mathematics, and writing tests, and all tests combined, from 1993 to 1997. While the district remains below the statewide passing rate, it increased its passing rate every year from 1993 to 1997.

Exhibit 2-5

Percentage Passing Texas Assessment of Academic Skills

Reading, Mathematics, Writing, and All Tests

SISD vs. Texas

1993-1997 School Years

Year	Reading		Mathematics		Writing		All Tests	
	SISD	TX	SISD	TX	SISD	TX	SISD	TX
1993	60.2	69.8	42.4	53.6	75.8	79.8	37.0	48.4
1994	68.9	76.5	56.0	60.5	75.1	76.7	48.6	55.6
1995	73.1	78.4	57.4	65.9	80.5	86.3	51.7	60.7
1996	78.4	80.4	71.2	74.2	81.9	82.9	62.6	67.1
1997	81.2	84.0	75.1	80.1	84.1	85.3	67.4	73.2

Source: AEIS.

In 1996-97, SISD's TAAS passing rate was second-highest in reading, writing, and all tests and fourth highest in mathematics among its peer districts (**Exhibit 2-6**).

Exhibit 2-6

Percentage Passing Texas Assessment of Academic Skills

Reading, Mathematics, Writing, and All Tests

SISD vs. Peer Districts

1996-97 School Year

District	Reading	Mathematics	Writing	All Tests
Ysleta	85.2	80.8	86.3	73.4
Socorro	81.2	75.1	84.1	67.4
Edinburg	80.0	75.7	78.8	66.8
El Paso	79.9	73.3	80.4	65.6
United	76.2	73.5	81.0	64.1
Pharr-San Juan-Alamo	74.0	76.0	78.2	64.1
Laredo	72.4	73.2	79.7	61.4
Southwest	72.1	66.7	82.2	57.3

Source: AEIS

This improvement may be due in part to SISD's use of site-based management and the YRE system. In addition, the review team attributes much of the improvement in SISD's TAAS scores to the El Paso Collaborative for Academic Excellence, an initiative that SISD joined in the 1993-94 school year in partnership with El Paso and Ysleta ISDs. This collaborative effort has received a five-year, \$15 million grant from the National Science Foundation's Urban Systemic Initiative (USI). The grant funds are distributed to the three school districts based on enrollment; SISD will receive \$837,511 for September 1, 1997 through February 28, 1999.

All of this money must be used for salaries. SISD uses it to employ a full-time USI program director, who directs the USI mentors and monitors the grant budget, and nine mathematics and science teacher-mentors. These teacher-mentors assist both faculty and students with mathematics and science by providing districtwide training, developing charts in mathematics that present TAAS scores for individual campuses by objective and various populations within the campus, and showing regular classroom teachers how to teach mathematics and science lessons. USI teacher-mentors actually teach lessons in the classroom to students to show the regular classroom teachers mathematics and science instructional strategies but do not have a regular classroom assignment. This is done so that they can be available to assist teachers throughout the district. SISD contributes funds to pay for training materials and substitutes needed when teachers attend training sessions. The collaborative has applied for a five-year extension of the grant.

COMMENDATION

SISD is raising its TAAS percentage passing rates and, in particular, its TAAS mathematics passing rates.

FINDING

Despite its increasing TAAS scores, SISD fares poorly among its peer districts in its share of students taking advanced courses, and this share fell between the 1994-95 and 1995-96 school years, the last school years reported on the state's AEIS system. Moreover, SISD is lowest in its share of students taking the SAT or ACT, and once again this share fell in the last school year (**Exhibit 2-7**). When asked to explain this, SISD stated that many of its students enroll in El Paso Community College (EPCC), where SAT or ACT tests are not required. This does not, however, explain SISD's poor performance in the area of advanced courses, nor why SISD's two El Paso-area peer districts, Ysleta and El Paso, both have higher percentages of Hispanic students taking college entrance exams.

Exhibit 2-7

**Percent of Students Taking Advanced Courses
and the ACT or SAT, SISD vs. Peer Districts**

District	% Taking Advanced Level Courses		% Taking ACT or SAT	
	1995	1996	1995	1996
United	14.1	20.9	42.4	49.7
Laredo	11.0	16.4	34.1	27.6
El Paso	8.4	12.8	57.3	58.6
Edinburg	11.6	12.1	64.1	64.3
Pharr-San Juan-Alamo	8.0	11.6	55.5	59.9
Ysleta	2.2	11.6	65.9	62.7
Southwest	11.0	9.3	67.8	82.5
Socorro	11.6	9.2	50.8	49.2

Source: AEIS

The USI teacher-mentors seem to have proven themselves in SISD schools, in that the district's TAAS mathematics passing rates have risen. The National Science Foundation grant will fund USI mentor positions through February 1999, and may be extended if the El Paso Collaborative for Academic Excellence is funded for another five years.

Recommendation 9:

Focus district efforts on increasing all students participation in advanced courses and college entrance testing.

Since USI mentors are highly trained and already are familiar with SISD school personnel, SISD should use their expertise to improve its participation in advanced courses and college entrance testing. The USI mentors should develop a mentor program focused on middle-school students. This program should also include a collaboration with the University of Texas at El Paso (UTEP) to provide weekly tutorials by UTEP student mentors, and parental seminars on higher educational opportunities on the UTEP and EPCC campuses.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The El Paso Collaborative for Academic Excellence develops strategies for encouraging students to take advanced-level courses and college entrance exams, including a mentor program in cooperation with UTEP.	April 1998
2	Students from SISD begin to meet on a weekly basis with UTEP student mentors.	October 1998
3	The collaborative and the director of Instructional Services, evaluates the mentor program and any other initiatives to determine their effectiveness.	In May of each year

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

Chapter 2

Instructional Administration and Management

CURRENT SITUATION

Eight central administrators and 23 school principals report to the assistant superintendent for Instruction. Several individuals report to each of the central administrators in turn (**Exhibit 2-8**).

Exhibit 2-8

Organization of Central Administration's Department of Instruction

1997-98 School Year

Director of Elementary Education	Director of Instructional Services	Director of Secondary Education	Director of Special Education	Director of Bilingual Education & G/T Education	Director of Career & Technology Education	Director of USI	Coordinator of Title I
shared secretary		secretary	secretary	shared secretary		clerk	budget clerk
library officer			administrative assistant	teacher leaders (4)	teacher leaders (3)	instructional aide	teacher leaders (2)
			teacher leaders (3)	G/T teacher leaders	secretary	mentor teachers (10)	migrant recruiter
			assessment staff (20)				migrant data entry
			related service providers (11)				migrant counselor clerk

Source: SISD Assistant Superintendent of Instruction.

SISD's instructional expenditures rose by 48 percent between the 1992-93 and 1995-96 school years. During this period, enrollment increased by 16 percent (**Exhibit 2-9**).

Exhibit 2-9

Instructional Actual Expenditures

1992-93 through 1995-96 School Years

Source	1992-93	1993-94	1994-95	1995-96
Instruction	\$40,295,767	\$44,995,442	\$49,306,202	\$55,864,992
Instructional Leadership	\$1,494,895	\$1,649,772	\$1,845,059	\$1,732,671
Instructional Resources and Media Services	\$1,280,337	\$1,562,385	\$1,510,638	\$1,778,198
School Leadership	\$4,147,420	\$4,759,586	\$5,148,123	\$5,960,104
Curriculum and Instructional Staff Development	\$547,038	\$631,923	\$741,092	\$947,442
TOTAL	\$44,765,457	\$53,599,108	\$58,551,114	\$66,283,407

Source: PEIMS

SISD's multi-track YRE system, used in its elementary and middle schools, involves four tracks, called the blue, green, red, and yellow tracks. Under SISD's "60-20" system, students attend school for three 60-day sessions, each followed by a 20-day vacation or intersession. In addition, students in all tracks receive a two-week vacation in December and July (**Exhibit 2-10**). Schools cannot maximize use of their facilities unless they operate all four tracks. If all schools operate four tracks with an evenly distributed student population in each track, SISD would be able to operate at 133 percent of its capacity.

Exhibit 2-10

SISD Four Multi-Tracks and Associated Calendar

1997-98 School Year

Calendar	Blue	Green	Red	Yellow
-----------------	-------------	--------------	------------	---------------

First Session	6/1-9/9	5/4-8/13	8/14-10/31	7/14-10/7
Second Session	10/8-12/19	9/10-11/26	12/1-2/27	11/3-1/30
Third Session	2/2-5/1	1/5-3/25	3/26-6/26	3/2-5/28

Source: SISD Student Calendar, 1997-98

In reality, however, most SISD schools operate with fewer than four tracks. Only six of SISD's 23 schools use all four tracks; seven schools, including the three high schools, operate only one (yellow) track (**Exhibit 2-11**).

Exhibit 2-11

SISD Schools and Tracks Operated

1997-98 School Year

School	Blue	Green	Red	Yellow
Americas HS				x
Campestra ES		x		x
Clarke MS	x	x	x	x
Cooper ES	x	x	x	x
Escontrias ECC			x	x
Escontrias ES			x	x
Helen Ball ES	x	x	x	x
Hilley ES				x
Horizon Heights ES				x
Hueco ES				x
KEYS Academy				x
Martinez ES	x	x	x	x
Montwood HS				x
O'Shea ES			x	x
Rojas ES			x	x

Sanchez MS			x	x
Sierra Vista ES	x	x	x	x
Slider MS			x	x
Socorro HS				x
Socorro MS	x	x	x	x
Vista del Sol ES	x		x	x

Source: SISD Student Calendar, 1997-98

FINDING

In fall 1990, SISD organized a task force of teachers, administrators, community members, students, and outside experts to study YRE issues. SISD felt compelled to consider YRE due to its rapid growth and the prediction of the U.S. Census Bureau that enrollment in most U.S. schools will decline after the year 2000. SISD felt it should not spend money on new school buildings if they were likely to become unnecessary in the near future. In addition, some of the educational research examined by the task force indicated that YRE improves student performance.

As part of its research, members of the task force examined alternatives to YRE, including double sessions, in which students attend morning or afternoon sessions at a school; greater use of portable classrooms; construction of additional facilities; increased class sizes; and an extended school year.

In addition, several community meetings were held throughout the district to inform as many people as possible about YRE. The district also created and circulated a newsletter about the task force and YRE. The assistant superintendent of Special Programs answered all questions received about YRE in writing and made these available to all SISD facilities. SISD has continuously monitored YRE since its implementation and made changes when necessary.

COMMENDATION

SISD's implementation of YRE provides a model for other districts involving thorough research of YRE options; an examination of the advantages and disadvantages of YRE and alternative solutions; monitoring of the effects of YRE on operating and capital costs; and exemplary communication with community members, parents, faculty members, and students about YRE.

FINDING

While SISD implemented YRE in a sound fashion, the district appears to be at a crossroads between single-track and multi-track YRE. Due to the district's rapid growth, some SISD administrators and board members believe multi-track YRE should be used throughout the district to accommodate additional students with minimal capital outlay. However, the district still faces questions concerning the effect of multi-track YRE on instructional quality, employee morale, operating costs, and facility usage.

As noted above, SISD attempts to place elementary and middle school siblings in the same track. The review team was told that this policy extends to students with siblings in high school. Because the high school only operates one track, yellow, this affects enrollment on all four tracks. The yellow track includes 66 percent of the district's students (**Exhibit 2-12**).

Exhibit 2-12

Track Enrollment, October 1997

Track	Enrollment	Percent of Students
blue	1,136	5
green	2,421	11
red	3,934	18
yellow	14,662	66

Source: Assistant Superintendent for Administration

Unsurprisingly, yellow-track enrollment is heavy even in schools operating all four tracks (**Exhibit 2-13**).

Exhibit 2-13

Enrollment by Track in Four-Track Schools

October 1997

School	Track			
	Blue	Green	Red	Yellow

Martinez ES	294	229	191	301
Helen Ball ES	213	253	215	402
Cooper ES	234	149	90	380
Sierra Vista ES	386	189	107	210
Clarke MS	266	175	195	431
Socorro MS	251	186	187	280
TOTAL	1,644	1,181	985	2,004

Source: Assistant Superintendent for Administration

Class sizes in SISD's elementary schools vary from track to track. Four elementary schools operate four tracks, including the Martinez, Helen Ball, Cooper, and Sierra Vista schools. TSPR used these schools to calculate average class sizes for grades 1 through 5 (**Exhibit 2-14**). When examining this exhibit, it is important to note the following limitations: First, Helen Ball Elementary has 13 orchard teachers who teach across all four tracks. Some of these teachers are regular education teachers and have small numbers of students on each track, which lowers the average class size across all four tracks. Second, Helen Ball Elementary and Cooper Elementary have several multi-age classes, in which children from two grades are taught together. To accurately compare class sizes, these combination classes were considered as follows: classes with both first- and second-grade children were coded as a first-grade classes, those with third- and fourth-graders were coded as grade 3 classes, and so on. Finally,

only regular education classes were used in the computation; bilingual and special education classes were excluded.

Exhibit 2-14

Average Class Sizes and Number of Classes, Grades 1-5

Elementary Schools Operating Four Tracks

1996-97 School Year

Grade	Total # of Classes	Track			
		Red	Blue	Green	Yellow
1	38	18.8	18.0	16.0	19.0
2	31	20.3	20.7	19.0	21.7
3	33	18.5	16.8	18.2	22.1
4	33	19.3	22.0	21.0	20.3
5	23	19.5	18.0	18.4	23.2

Source: SISD campus reports to administration, 11-5-97

Note that the yellow track has the largest average class sizes at all grade levels except grade 4. In addition, school operating all four tracks have more regular education classes on the yellow track.

Uneven enrollment across tracks and unequal class sizes can affect instruction in various ways. For example, some courses may not be offered to a particular track. And, sometimes teachers may teach students on two or more tracks in one class. For subjects that are highly sequential, like mathematics and foreign languages, trying to offer sequential courses to different tracks of students may not always be possible, especially if only a handful of students are needing these courses in a given track.

State law limits the ratio of students to teachers to 22 to 1 in kindergarten through grade 4. Districts may obtain waivers for a single semester due to inadequate facilities or an inability to hire additional teachers. SISD has many classes that exceed this state mandated student-teacher ratio. For the 1997-98 school year, SISD received waivers to exceed this ratio for 22 percent of its first-grade classes. For grades K-4, SISD has waivers to exceed the state ratio for about 12 percent of its classes (**Exhibit 2-15**). SISD cites two reasons for its large number of waivers: a simple lack of facilities, and a district policy of placing siblings on the same YRE track, which overloads some classes.

Exhibit 2-15

Maximum Class Size Waivers in SISD

1997-98 School Year

Grade	Total Number of Classes	Number of Classes Exceeding 22:1	Percent of Classes Exceeding 22:1
K	75	5	7%
1	86	19	22%
2	94	7	7%
3	91	10	11%
4	91	11	12%
Total	437	52	12%

Source: TEA

By contrast, SISD's secondary class sizes compare well with those in its peer districts (**Exhibit 2-16**). None of SISD's secondary classes contain more than 35 students. Multi-track YRE and low enrollment in some tracks contribute to smaller secondary classes.

Exhibit 2-16

Average Secondary Class Size, SISD vs. Peer Districts

1996-97 School Year

DISTRICT	Foreign Language	Social Studies	Science	Mathematics	English
United	20.8	20.4	19.8	19.7	19.0
Pharr-San Juan-Alamo	20.9	23.4	22.1	22.2	21.6
Edinburg	22.0	23.7	23.2	22.7	21.9
El Paso	22.1	24.3	24.7	24.0	23.4
Socorro	22.7	23.6	23.3	21.7	20.9
Ysleta	23.6	24.2	24.3	23.1	21.5

Laredo	24.4	24.3	23.2	22.8	22.3
Southwest	25.5	23.2	22.3	21.1	21.4

Source: AEIS

In addition, multi-track YRE makes it impossible for all staff members to be at school at the same time, which can lead to communication breakdowns. Some staff members may find it difficult to attend workshops or conferences designed to improve their expertise since workshops or conferences may not coincide with their calendar.

Furthermore, under a multi-track system, some groups of students are attending class 234 days a year. To serve students in courses such as electives, physical education, special education, and other specialized classes, the district must have one specialized teacher instructing all four tracks, an option that is hard on the teacher but cost-effective for the district, or have one teacher per track, which can be more costly for the district and may be a difficult position to fill.

Professionals on extended or multiple-track calendars include nurses, librarians, special education teachers, speech therapists, physical therapists, diagnosticians, teacher/teachers leaders for bilingual, special education, Title I, USI mentor-teachers, PE teachers, computer lab teachers, and elective teachers. Non-professionals on extended contracts include library aides, special assignment class aides, school teaching assistants, food service staff, custodians, bus drivers, crossing guards, lunch monitors, security guards, and other support staff. Since professionals are not allowed to work more than 226 days a year, substitutes often fill in when these professionals take their non-duty days, resulting in high costs for substitute pay.

In fall 1997, SISD's principals conducted a study of the costs of operating a single-track versus a multi-track YRE system. The report will be presented to the District's Blueprint for the Twenty-first Century Committee. While this report has not been verified or officially entered into the record, it contains useful information. **Exhibit 2-17** illustrates the additional costs incurred by elementary and middle schools on multiple tracks for extended contracts for professionals and nonprofessionals, substitutes for non-duty days, additional transportation costs, and special programs.

Additional salary costs were calculated by first establishing the difference in days worked between regular and extended contracts. Salaries then were prorated using the actual salary of each person in a given position; when a position was vacant, the base salary of that position was used.

For professionals, extra salary compensation was calculated by finding the difference between the number of days the professional currently works and 186 days, the normal calendar year for teachers in most Texas schools. Crossing guards' and lunch monitors' extra salary compensation was calculated according to the difference between the number of days worked and 180 (three sixty-day sessions), since these positions normally work only when students are in school. Custodians' extra salary compensation was calculated using the difference between 239 (the number of days a custodian works on a multi-track calendar) and 226 days (the number of days a custodian normally works) since custodians can complete some of their tasks only when students are not in school. Food service workers' extra salary compensation was calculated using the difference between 186 days (allowing for six extra days of preparation time) and the actual days worked on the extended calendar. Salary costs for full-time transportation workers are included; part-time salaries are not included. Finally, although substitute costs vary, for the purposes of this study, substitute costs were calculated at \$50 a day, the cost of a substitute with a bachelor's degree.

Exhibit 2-17

Estimated Additional Costs of Multi-Track versus Single-Track YRE

Salaries, Special Programs, and Transportation

1996-97 School Year

School or Department	Additional Total Costs
Martinez Elementary	\$84,947
Campestra Elementary	\$62,033
Escontrias Elementary	\$77,150
Escontrias Early Childhood Center	\$47,988
Helen Ball Elementary	\$184,296
Cooper Elementary	\$95,689
O'Shea Elementary	\$98,405
Rojas Elementary	\$78,128
Sierra Vista Elementary	\$79,837
Vista Del Sol Elementary	\$66,137

Chavez Elementary	\$88,942
Sanchez Middle School	\$121,735
Socorro Middle School	\$143,594
Slider Middle School	\$155,550
Clarke Middle School	\$135,940
Montwood Middle School	\$90,863
Special Programs	\$236,308
Transportation	\$81,105

Source: SISD Principal's report, fall 1997

The assistant superintendent of Strategic Planning, however, asserts that the principals' report over-estimates costs. At this writing, a formal rebuttal of those numbers has not been prepared, nor were specifics regarding the nature of the differences made available to the review team.

Since one of the reasons for a multi-track system is greater efficiency in the use of facilities, facilities usage also should be factored into the cost of multi-track education. **Exhibit 2-18** illustrates SISD's present enrollment, the maximum enrollment possible for both single-track and four-track systems, and the projected enrollment over the next three years at each school in SISD.

Exhibit 2-18

Present Enrollment, Maximum Enrollment, and Projected Enrollment

1998-99 to 2000-01 School Years

School	Present Enrollment	Maximum Enrollment with Single-Track	Maximum Enrollment with Multi-Track	Projected Enrollment 1998-99	Projected Enrollment 1999-2000	Projected Enrollment 2000-01
Americas HS	1,275	2,560	2,580	1,468	1,688	1,939
Montwood	2,463	2,560	2,580	2,709	2,980	3,278

HS						
Socorro HS	2,269	2,560	2,580	2,314	2,361	2,408
Clarke MS	1,067	840	1,120	1,174	1,291	1,420
Montwood MS	837	800	1,065	983	1,107	1,273
Sanchez MS	1,026	840	1,120	1,077	1,131	1,188
Slider MS	935	840	1,120	962	1,031	1,082
Socorro MS	904	840	1,120	949	997	1,046
Martinez ES	1,015	920	1,226	1,065	1,119	1,175
Helen Ball ES	1,083	880	1,173	1,191	1,310	1,441
Campestra ES	761	680	906	799	839	881
Chavez ES	807	960	1,308	928	1,067	1,227
Cooper ES	853	840	1,120	895	940	987
Escontrias EEC	628	580	746	659	692	727
Escontrias ES	688	840	1,120	722	759	798
Hilley ES	683	720	960	717	753	791
Horizon ES	857	680	906	943	1,037	1,141
Hueco ES	495	680	906	505	515	525
O'Shea ES	930	840	1,120	977	1,025	1,077
Rojas ES	861	840	1,120	904	949	997
Vista Del Sol ES	707	1,000	1,333	742	779	818
Sierra Vista ES	892	900	1,120	937	983	1,033

Total	22,118	21,680	28,249	23,620	25,353	27,252
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Source: Office of Support Services, SISD

As this exhibit illustrates, SISD could not accommodate all of its students enrolled in the 1997-98 school year with single-track YRE. Moreover, a single-track system would not accommodate anticipated enrollments through 2001; however, the district has enough facility space to operate multi-track YRE through 2000-01 without building new schools.

To finance new school construction, SISD is taking advantage of a recent state law to pay for portions of the debt service used to build qualified school facilities under the Instruction Facilities Allotment program. On January 21, 1998, the Texas Education Agency (TEA) notified SISD that its application had been approved contingent upon the receipt of some additional information and the actual sale of bonds. The estimated state subsidy for the first year, 1998-99, is about \$1.8 million.

Recommendation 10:

Develop a plan to serve increasing enrollments effectively and efficiently while equalizing enrollment at schools.

At a minimum, the plan should address the need to reduce the number of class size waivers at the elementary school level. The following summary outlines the pros and cons of a pure single-track system and pure multi-track system and their impact. The district, of course, should consider reasonable alternatives tailored to this community and developed by school personnel and the public.

Option One: Move to single-track, year-round education at all schools.

Academic Achievement

Some educational research indicates that students in year-round education spend less time on review and more time on new instruction than students in traditional schemes. According to Rosenfield's (1994) *Year-Round Schools and Academics*, students with limited proficiency in English and other educationally disadvantaged students often do better under YRE. Other research, however, including some conducted in large urban districts, indicates that YRE does not result in long-term academic gains (*The Effects of Summer Vacation on Achievement Test Scores: A Narrative and Meta-analytic Review*, CQ Researcher, May, 1996. Harris Cooper et al.). A single-track schedule may result in greater continuity of instruction and less fragmentation in sequential courses than a multi-track system.

Special programs and extracurricular activities can be accommodated more easily on a single track than in multiple tracks.

Employee Morale

The school calendar would be flexible and consistent. Staff development could be coordinated and planned across the district more effectively than with multiple tracks, though not as easily as with a traditional calendar. Communication would be more efficient on a single-track plan since all school personnel would be in attendance at the same time. In addition, there would be less administrative burnout since campus administrators would have students on campus only 226 days a year.

Fiscal Implications

SISD receives additional compensatory education funds for its extended-year calendar that are not available to districts on a traditional calendar. However, additional costs for utilities and maintenance are higher than those on a traditional calendar. Some studies indicate that over time, the operating costs of YRE eventually equal the costs of maintaining a traditional calendar and building new schools (Folsom Cordova Unified School District, Multi-Track Calendar Task Force, school board item number 9596-138, Dec. 1995).

Facility Usage

Districtwide use of a single track would require the district to increase classroom space with portable buildings. SISD also could redraw attendance boundaries to equalize attendance and reduce overcrowding. In all, though, moving to a single track at all schools would require SISD to construct new schools very quickly (within one to three years). In any YRE system, wear on existing facilities increases and the corresponding improvement and maintenance costs may offset savings on capital outlay. Studies indicate that year-round education must operate at 120 percent of capacity to break even on costs. This is not possible for SISD on a single track.

Family/Community Life

Since camps are generally scheduled for summer, children may miss events such as Boy Scout camp because of scheduling difficulties. Some parents may experience difficulty arranging childcare since daycare options for school-aged children are generally available in the summer months.

Option Two: Remain on a multi-track year round system; reduce enrollment in the yellow track by shifting one of the district's high schools from the yellow track to another track.

Siblings of students attending that high school would have the option of attending school on the same track, thus minimizing family disruption. Moving one high school's students and their siblings to a less-populous track should help to equalize attendance and reduce crowding.

Academic Achievement

It is difficult and often costly to maintain all academic course offerings under this arrangement because there might not be enough students on one track to justify the course. In addition, if four tracks are offered at elementary and middle school and only two tracks at high school, parents may want their younger children moved to accommodate older siblings schedules. Research from long-term year-round education projects in San Diego, both multi-track and single track, have had mixed results academically.

Employee Morale

Teachers who teach on multiple tracks earn additional salary. However, the multi-track system requires more time for planning, coordination, and record keeping. Additional administrative and clerical time are required to maintain an orderly system. Principals in multi-track schools work a longer year than those in traditional or single-track schools. Despite their additional responsibilities, many principals at multi-track schools are not compensated based on the number of tracks at their school. Communication tends to break down because all staff members are not present at one time. In addition, many teachers do not have their own classrooms and must share teaching and storage space.

Fiscal Implications

The district saves money on capital outlay (building new schools) because multiple tracks allow for increased enrollment. Additional costs, as detailed above, include salary increases, substitute pay, and increased operating and maintenance costs. These often eventually offset the cost of new construction.

Facility Usage

In theory, operating on four tracks allows for a 33 percent increase in capacity. On a single track, SISD cannot accommodate its current enrollment. Even with a multiple-track, year-round system, the district will

outgrow its facilities by the 2000-2001 school year. The multiple-track system results in increased wear on existing buildings and requires additional maintenance costs.

Family/Community Life

Students who participate in extracurricular activities such as athletics, band, chorus, and drama are badly affected by the multi-track system. They must return to school during their vacations to practice and participate. Scheduling activities that require the participation of all of the high schools would be difficult. While all students in a family can attend school on the same track, some students may not be on the same schedule as other students in their neighborhoods, which could affect social relationships.

IMPLEMENTATION AND TIMELINES

1	The assistant superintendent of Strategic Planning chairs a committee of administrators, teachers, support staff, parents, and community members to consider these and other plans to deal with the district's increasing enrollment.	April 1998 - August 1998
2	The committee makes a decision and takes it to the school board for approval.	September 1998
3	The district implements the plan.	January 1999 - August 2000

FISCAL IMPACT

This recommendation can be accomplished within existing resources, although the district's ultimate decision may have significant financial implications.

FINDING

SISD's current site-based organization gives its individual schools a great deal of autonomy and has encouraged the development of many innovative programs; however, the district could give greater attention to identifying and sharing successful practices among its schools. The director of Instructional Services is responsible for directing SISD's Effective Schools Study and using this information to assist in school improvement. The Effective Schools Study examines the areas of instructional leadership, school climate, and employee morale, but does not address individual school programs.

Special programs operate differently depending on the school. For example, students in special education are included in the general education program with greater success in one school than another. Similarly, students in gifted education receive diverse educational offerings from one school to the next. SISD should ensure that students are receiving the best education by evaluating the instructional practices of all its academic programs.

In 1995-96, the Waco ISD set up a program called "What Works", whereby schools are allowed to implement programs under three conditions:

- 1) the program is listed in the "What Works" compendium that was developed after a comprehensive review of educational research.
- 2) the site-based committee can provide documentation showing the program has produced desired results under similar circumstances, or
- 3) it is a pilot project for which research design is developed and used to measure results for a period of time not to exceed three years.

The principal and site-based committee must agree to discontinue the program if results are not achieved. Measurement criteria are established before the program is put into place, and annual evaluations of the programs are conducted. If the programs are not achieving the desired results, adjustments are made during the three years to improve the delivery. However, if at the end of the three years results are not achieved, the program is abandoned. There are no surprises, since the individuals involved in the process have been a part of the evaluation and clearly understand why continuation is not possible.

Recommendation 11:

Create a specialist position in the Division of Strategic Planning to evaluate SISD programs.

The specialist should be in charge of evaluating instructional programs. In addition, following the Waco ISD model, the specialist should develop evaluation procedures that include measurement criteria that will be used to assess the program's effectiveness over time for each existing district program and establish criteria for adopting and assessing all future programs prior to implementation.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The assistant superintendent of Strategic Planning and the assistant superintendent of Human Resources advertise for the new position.	April 1998
2	The assistant superintendent of Strategic Planning and the assistant superintendent of Human Resources interview applicants and make a recommendation for hiring one of the candidates.	October 1998
3	Once hired, the evaluation specialist selects a program evaluation model, develops a timeline for evaluating all of the district's academic programs, and begins to implement the process.	February 1999- Ongoing

FISCAL IMPACT

The fiscal impact of this recommendation is based on an annual salary of \$45,000 plus benefits of \$8,476.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Create position for program evaluation.	(\$53,476)	(\$53,476)	(\$53,476)	(\$53,476)	(\$53,476)

Chapter 4

MANAGEMENT AND OPERATIONS

Bilingual/English as a Second Language (ESL) programs are required by federal and state laws to provide educational access to students whose first language is not English. Specifically, these programs are designed to help Limited-English-Proficient (LEP) students learn English.

Exhibit 2-19 lists specific requirements of the Texas Education Code related to Bilingual Education/ESL programs.

Exhibit 2-19

Texas Education Code and the Texas Administrative Code requirements

Bilingual Education/ESL Programs

Component	Law	Contents
Required Program	Texas Education Code 29.053 19 TAC 89.2(a)	Each district with an enrollment of 20 or more students of limited English proficiency in any language classification in the same grade level shall offer a bilingual or special language program. Additionally, bilingual education must be offered to students in kindergarten through the elementary grades; bilingual education, instruction in English as a second language, or other transitional language instruction must be offered to students in post-elementary through grade 8; and instruction in English as a second language must be offered to students in grades 9 through 12.
Curriculum	Texas Education Code, 29.055 19 TAC 89.2(b), 89.3, and 89.14	Bilingual education programs are full-time programs which offer dual-language instruction and provide for mastery of English language skills and learning basic skills in the primary language of the students enrolled in the program. English as a second language programs are programs of intensive instruction in English offered by teachers trained in recognizing and dealing with language differences.
Identification, Assessment, and	Texas Education	Criteria for identification of LEP may include:

Classification	Code, 29.056 19 TAC 89.6	(1) Results from a home language survey (available in both English and the home language) designed to determine the language normally used in the home and normally used by students. (2) Results of a TEA- approved English language proficiency test administered to all students identified through the home survey as speaking a language other than English. Students in kindergarten and grade 1 are administered an oral language proficiency test and students in grades 2 through 12 are administered an oral and written language proficiency test. (3) Results of a TEA-approved proficiency test in the primary language of students identified by the English language proficiency test as LEP.
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Source: Texas School Law Bulletin

CURRENT SITUATION

In the 1996-97 school year, 10,993 or 52.1 percent of SISD's students were identified as LEP; 5,002 students were served in the district's bilingual education program. Among its peer districts, SISD had the second-highest share of LEP students and the second-highest expenditures on bilingual education. As a percentage of total program budgets, SISD's bilingual expenditures are second only to Edinburg (**Exhibit 2-20**).

Exhibit 2-20

Bilingual Education Expenditures

SISD vs. Peer Districts

1996-97 School Year

District	Expenditures	Percent of Program Expenditures	Number of LEP Students	Percent of LEP Students
Edinburg	\$13,354,442	23.9	7,197	37.6
Socorro	\$5,257,721	10.3	10,993	52.1
Laredo	\$3,004,431	4.7	12,198	53.1

El Paso	\$1,931,892	1.2	20,412	31.7
Ysleta	\$1,672,454	1.3	10,324	21.8
Pharr/San Juan /Alamo	\$1,428,913	2.4	8,145	40.0
United	\$1,226,531	2.4	10,214	47.8
Southwest	\$410,863	1.6	1,290	14.0

Source: AEIS

From 1993-94 to 1996-97, SISD's total expenditures on bilingual education rose by 37 percent. At the same time, the number of students served through bilingual education increased 23 percent; expenditures per student increased 11 percent (**Exhibit 2-21**).

Exhibit 2-21

Bilingual Education Expenditures

1993-94 through 1996-97 School Years

	1993-94	1994-95	1995-96	1996-97
Bilingual Expenditures	\$3,849,054	\$4,290,473	\$4,795,414	\$5,257,721
Bilingual Students Served	4,077	4,585	5,447	5,002
Bilingual Expenditures per Student	\$944	\$936	\$880	\$1,051

Source: AEIS

SISD offers both Bilingual Education (BE) and English as a Second Language (ESL) programs. The BE program is called the Bilingual Immersion Program and serves Pre-K through Grade 6. The ESL program serves students in grades 7 through 12.

According to the district, the Bilingual Immersion Program has two components. First, students' first language is developed through a native language component. Students in grades 1-3 receive 90 minutes and students in grades 4-6 receive 45 minutes of native language instruction per day. The second component is immersion in English through the Thematic Learning Component (TLC), an approach that focuses on instruction applying specific themes or topics in several academic areas.

The ESL program has four levels of instruction in English. Students who have no English language facility and a low level of academic skills are placed in Level I English. Students who score a 1+ in English on the oral language proficiency test and have well-developed language skills in their native language are placed in Level II English. Students who score a level 2 or 3 on the oral language proficiency test and have well-developed native language skills are placed in Level III English. Students who score a 4 in English on the oral language proficiency test and are able to succeed in English instruction with little additional help are placed in Level IV English.

FINDING

o improve the reading performance of economically disadvantaged LEP students on the first TAAS test at third grade, the Region XIX educational service center has begun a staff development project in cooperation with Regions 18 and 15. The project, called *Who's on First?*, focuses on effective teaching strategies for first-grade teachers. The project's objectives include securing a corporate sponsor for a minimum of 10 percent of 150 first-grade mentor teachers; partnering 150 first-grade teachers with an interregional or intraregional first grade mentor teacher; and providing eight hours of training for 150 first-grade mentor teachers. The training focuses on clear articulation of effective teaching strategies; two to three days of on-site mentor observation experience; and training emphasizing third-grade TAAS objectives, critical components of effective reading programs, approaches for bilingual education/ESL, parental literacy, and reading curriculum. Other objectives of *Who's on First?* include providing three separate hours of additional interregional teacher/mentor interaction via interactive video-conferencing to review lessons learned; applying lessons learned to the revision of school action plans for reading; and disseminating a first-grade teacher training model statewide based on project experiences.

SISD has developed timelines for implementing this program and is pairing 14 first-grade mentor teachers with 14 bilingual first-grade teachers. The plan for 1997-98 includes on-site observations, interactive video-conferencing sessions, mentor and teacher training, evaluation, and dissemination.

Because 89 percent of SISD's students are Hispanic and about half of its students are LEP, SISD must have a strong bilingual program to firmly establish LEP students' literacy skills. Since 1993, SISD's Hispanic students have had the lowest TAAS passing rates in reading of all ethnic groups in the district. Hispanic students have had the lowest passing rates in writing since 1995. However, SISD is closing the gap between its Hispanic students' and Anglo students' TAAS passing rates. While Anglo

students passed TAAS reading at a 14.4 percent greater rate than Hispanic students in 1992-93, this gap fell to 11.5 percent in 1996-97 (**Exhibit 2-22**).

Exhibit 2-22

TAAS Performance by Ethnic Group

1992-93 through 1996-97 School Years

	1992-93		1993-94		1994-95		1995-96		1996-97	
	Read	Write	Read	Write	Read	Write	Read	Write	Read	Write
White	79.2	82.7	85.2	70.7	85.6	87.5	90.7	90.4	91.4	93.7
Hispanic	57.7	74.6	66.7	54.2	71.2	79.9	76.7	80.5	79.9	82.9
African-American	55	83.7	72	42	80.7	68.8	80.6	91.9	84.2	89.1
Asian-American	69.2*	84.6*	66.7*	58.3*	82.8	69.2	84.6	88.9	93	95.7
Native American	*	*	*	*	90.9	93.3	87.5	100	100	N/A

Source: AEIS

COMMENDATION

SISD's participation in the Region XIX education service center project, *Who's on First?*, is a positive step toward improving reading achievement for economically disadvantaged LEP students.

FINDING

SISD's ESL and BE programs vary widely from school to school. For example, Sanchez Middle School has a core team of bilingual and ESL teachers, each with a different area of expertise. Sixth-grade students in the BE program are placed in a class according to their level of English proficiency. Each class travels from teacher to teacher for instruction depending on the teacher's area of expertise. Grade 7 and 8 students in the ESL program are placed in heterogeneous groups. Each group travels from teacher to teacher for instruction depending on the teacher's area of expertise. On the other hand, Socorro Middle School groups students according to English proficiency and teaches each class in a self-contained setting.

As already noted, SISD bilingual education relies primarily on the Bilingual Immersion program. Two elementary schools, however, Hilley and Sierra Vista, have adopted a state-of-the-art dual language program for bilingual education. This program combines monolingual English students with monolingual Spanish students and teaches them both English and Spanish. The program keeps a strict division between the languages in the beginning, thereby developing both languages. Hilley elementary has adopted a 90/10 model in which students begin with 90 percent of their instruction in Spanish and 10 percent of their instruction in English. Sierra Vista has adopted a 50/50 model, with instruction time evenly divided between Spanish and English. Each year, the time spent on Spanish instruction decreases by 10 percent and the amount of time for English instruction increases by 10 percent.

SISD's site-based decision-making model allows for flexibility in the implementation of specific instructional models at each school. However, the district's BE program does not seem to maintain a consistent curriculum among its schools. In addition, in the principals' focus meeting conducted by the review team, several principals discussed the lack of consistency in the bilingual program. While this performance review is not intended to provide a curriculum audit, it is important to consider the effectiveness of the district BE/ESL program, which provides a foundation for all other instruction, and uses a significant amount of the district's budget and serves a high percentage of the district's students.

Recommendation 12:

Require each school in SISD to submit a written description and assessment of its Bilingual and English as a Second Language curricula.

Each school should be required to report, on a quarterly schedule, its total number of LEP students, expenditures per student, and the academic progress of LEP students, including passing and failing grades and TAAS scores.

The written description of each school's program should include information about how students are grouped according to English proficiency; the setting in which students should receive instruction in core academic subjects; the amount of time students are instructed in their native language; the goals of the program or expected progress of the students; and the evaluation procedures used to measure the program's progress in meeting its goals. Compare school data and replicate the programs from schools where academic achievement is highest.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Instruction and the program evaluation specialist develop short- and long-term evaluation procedures and collect quarterly data from each school.	April 1998
2	The assistant superintendent for Instruction and the program evaluation specialist submit the findings to the superintendent, the director of Bilingual Education, and each principal.	September of each year
3	The principals implement revised BE curricula, supported by BE personnel.	October of each year

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

In most cases, the SISD schools' expenditures for BE/ESL tend to mirror their share of LEP students. However, a few exceptions occur. For example, among elementary schools, Horizon Heights has the seventh-largest percent of LEP students, yet the fourth-largest expenditures for BE/ESL. Among middle schools, Sanchez and Clark devote the same percentage of expenditures to BE/ESL, yet Sanchez has 34 percent more LEP students (**Exhibit 2-23**).

Exhibit 2-23

LEP Enrollment and Expenditures on BE/ESL by School

1996-97 School Year

School	LEP Enrollment	Percent LEP Enrollment	Expenditures	Percent of School Expenditures
Campestra ES	694	91%	\$655,606	41%
Hilley ES	549	74%	\$472,825	32%
Escontrias ECC	472	76%	\$343,109	32%
Rojas ES	613	69%	\$555,645	29%
Horizon Heights ES	489	60%	\$446,076	28%
Escontrias ES	493	77%	\$432,273	22%

Hueco ES	396	73%	\$268,872	21%
Cooper ES	414	49%	\$408,883	21%
Vista del Sol ES	351	45%	\$350,590	19%
O'Shea ES	356	37%	\$324,683	17%
Sierra Vista ES	416	45%	\$268,236	16%
Martinez ES	277	27%	\$272,886	14%
Helen Ball ES	438	35%	\$271,356	12%
Socorro MS	715	77%	\$27,367	1.1%
Sanchez MS	704	73%	\$19,289	.7%
Clarke MS	379	39%	\$17,783	.7%
Slider MS	376	28%	\$3,524	.1%

Source: AEIS

Since SISD's student population is increasing rapidly and is predominately Hispanic, it is critical to ensure that BE/ESL funding is spent as effectively as possible. However, determining effectiveness is difficult when there are few common elements to use for assessment.

Recommendation 13:

Require the director of Bilingual Education to set standards for the equitable expenditure of bilingual funds at each school.

To ensure equitable distribution of resources for bilingual education, SISD should standardize its funding allocation procedures and monitor the effectiveness of each school program.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The director of Bilingual Education requires each school to submit its budget for BE/ESL instruction.	April 1998
2	The director of Bilingual Education allocates funds to schools based on number of students and the school's specific needs.	September of each year

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

Chapter 2

SPECIAL EDUCATION/DYSLEXIA

CURRENT SITUATION

Services for special education students are federally mandated and must meet specific state and federal guidelines. The most comprehensive federal law governing special education is the Individuals with Disabilities Education Act (IDEA). To meet the requirements of IDEA, most school districts complete a specific sequence of steps (**Exhibit 2-24**).

Exhibit 2-24

Steps to Meet the Requirements of IDEA

<p>1. Pre-referral intervention in regular education. When a student experiences academic problems in regular education, intervention can and should occur to remediate academic problems. Pre-referral interventions can be prompted by individual teachers or by committees or teams charged with the responsibility. If the strategies initiated in regular education do not result in improved achievement, a referral is made to special education.</p>
<p>2. Referral to special education for evaluation. Referring a student to special education requires a written request supported by documentation. Teachers, counselors, parents, administrators, and even the student him/herself can initiate a referral. The referral information must include an explanation of steps that have been taken in regular education to try to remediate the problem prior to the referral.</p>
<p>3. Assessment. Once a student has been referred, the district must provide a comprehensive evaluation of the case, commonly called an assessment, within a prescribed time period.</p>
<p>4. Initial placement through a committee meeting. After the evaluation is complete, a meeting is held to discuss its results, decide if the student qualifies for special education services in one of the 13 federal special education categories, and, if so, write a plan for educating the student. In Texas, the committee is called commonly referred to as an Admission, Review, and Dismissal (ARD) committee; according to federal guidelines, parents must be included as active participants in the process.</p>
<p>5. Provision of educational services and supports according to a written Individualized Education Plan (IEP). The IEP developed by the ARD committee includes information about which classes the student will take, how much time will be spent in regular education, the type of service</p>

<p>delivery model, related services like speech therapy or counseling, mode of transportation, and several other considerations required by state and federal law.</p>
<p>6. Annual program review. Each year after a student's initial qualification and placement, a review is conducted to assure the provision of an appropriate program for the student. In this annual ARD meeting, the results of any evaluations are discussed, progress reviewed, goals rewritten, decisions made regarding placement and programming, and a new IEP written.</p>
<p>7. Three-year reevaluation. Every three years, the student may again be given a comprehensive individual assessment. Another ARD is held to discuss the results of the reevaluation and determine if the student still qualifies for special education. Again, a complete IEP is written and plans are made for its implementation.</p>
<p>8. Dismissal from the special education program. If and when a student no longer meets special education eligibility criteria, he or she is dismissed from special education and services are no longer provided. The ARD committee must make this decision.</p>

Source: Public Law 101-15, the 1997 amendments to the Individuals with Disabilities Education Act

At every stage of the special education process and throughout a student's tenure in special education, state and federal guidelines must be followed. If disagreements or objections related to evaluation, placement, or service delivery arise, students and their families have the right to due process. School districts do not have the burden of demonstrating that their special education services are the best possible, but the education provided must meet each student's individual needs.

Special education is an important issue for any school district, because the costs associated with it are high. While the federal government mandates specific special education services, its share of funding for special education is usually less than 10 percent, with the rest of the costs paid from state and local funds.

In 1996-97, SISD served 2,128 students in special education (10.1 percent of the student population). SISD's percentage of its student population in special education ranks in the middle of the peer districts and below the state average.

Exhibit 2-25

Percentage of Students Served in Special Education

SISD vs. Peer Districts and Statewide Average

1996-97 School Year

District	Percent Special Education Students
Southwest	13.9
Laredo	11.8
State of Texas	11.6
Edinburg	10.2
Socorro	10.1
El Paso	9.0
Ysleta	9.0
United	8.5
Pharr-San Juan-Alamo	6.8

Source: AEIS

SISD's special education program had a total annual budget for 1996-97 of \$8.7 million. Of that amount, approximately \$620,000 represented federal funds. **Exhibit 2-26** illustrates the district's staffing of its special education program.

Exhibit 2-26

Special Education Staffing

1997-98 School Year

Position	Number
Director	1
Administrative Assistant	1
Psychologist	1
Associate Psychologist	1

Diagnosticians	12
Teacher-teacher coordinators	3
Special education counselors	6
Teachers	115.5
Aides	67
Clerical positions	15
Administrative Assistant	1
Adaptive P.E. teachers	2
Occupational therapists	2.5
Physical therapists	2.5
Vocational adjustment coordinator	1
Job coach	1
VI Itinerant teachers	2
Homebound teacher	2
Speech therapists (assessment)	6
Speech therapists (school based)	15

Source: Director of Special Education, SISD

Shared services in special education include agreements with the Regional Day School Program for the Deaf, the Region XIX Education Service Center, and the Region XIX Head Start Preschool Program. In addition, the district notifies private schools within district boundaries of available services for private school students who qualify for special education and serves some of these students with individualized services such as speech therapy.

In 1996-97, 2,128 students in SISD received special education services in 13 categories.

Exhibit 2-27 presents the number of special education students in each category for Texas and for the district. Compared to statewide totals, SISD has a greater share of students in the learning disability and speech impairments categories and a smaller share in the emotional disturbance, other health impairments, and mental retardation categories.

Exhibit 2-27

Special Education Students by Disability Category
(As a Percentage of All Students with Disabilities)

SISD vs. Texas Totals

1996-97 School Year

Disability	Percent	
	Texas	SISD
Learning Disability	60.1	66.8
Speech Impairments	15.4	18.9
Emotional Disturbance	8.1	2.8
Other Health Impairments	5.8	1.5
Mental Retardation	5.6	3.7
Hearing Impairments	1.3	<1
Orthopedic Impairments	1.2	3.4
Multiple Disabilities	<1	<1
Autism	<1	<1
Visual Impairments	<1	<1
Traumatic Brain Injury	<1	<1
Deaf-Blindness	<1	<1
Non Categorical Early Childhood	<1	<1

Source: TEA and SISD Director of Special Education

The most recent evaluations of SISD's program include a 1997 TEA District Effectiveness and Compliance visit in February 1997 and a 1995 TEA review of the district's compliance with state and federal laws on residential care facilities. These reviews found SISD in compliance with all applicable indicators. In addition, TEA found the district committed to increased inclusion of students with disabilities into all SISD programs. TEA complimented the district on its high level of professionalism and indicated that its special education staff is both qualified and adequate. In its application for funding, SISD articulated its commitment to increasing its number of inclusionary instructional settings, especially Content

Mastery Centers and inclusionary arrangements for preschool students with disabilities.

TSPR's survey indicated that parents, teachers, and principals are satisfied with SISD's special education program, both in terms of identification and service provision (**Exhibit 2-28**).

Exhibit 2-28

Parents (N=37), Teachers and Principals (N=162) Responses to Survey Questions Related to Special Education

Survey Question	Strongly Agree Agree		Neutral No Response No Opinion		Disagree Strongly Disagree	
	Parents	Teachers/Principals	Parents	Teachers/ Principals	Parents	Teachers/ Principals
The special education program at my (children's) school does a good job of educating students.	18 48.6%	121 74.7%	18 48.6%	32 19.8%	1 2.7%	9 5.5%
The special education program at my (children's) school identifies the right students to receive services.	15 40.5%	126 77.8%	21 56.7%	30 18.5%	1 2.7%	6 3.7%

Source: Texas School Performance Review

FINDING

From the 1992-93 school year through 1996-97, the share of SISD students in special education rose from 7 percent of the student population to more than 10 percent (**Exhibit 2-29**). Referrals of students during this same period increased from 551 to 667, a total increase of 17.3 percent (**Exhibit 2-30**).

Exhibit 2-29

Number and Percent of Special Education Students in SISD

1992-93 to 1996-97

Year	Number	Percent
1992-93	1,235	7
1993-94	1,395	8
1994-95	1,713	9
1995-96	1,580	8
1996-97	2,155	11

Source: PEIMS

Exhibit 2-30

Number and Percent of Referrals to Special Education in SISD

1992-93 to 1996-97

Year	Number of Referrals	Percent of Referrals
1992-93	551	3.3
1993-94	631	3.6
1994-95	674	3.6
1995-96	692	3.4
1996-97	667	3.3

Source: Director of Special Education, SISD

SISD has programs in place designed to minimize referrals to special education and serve more students successfully in regular education settings. First, all schools in SISD have pre-referral committees designed to help remediate students' academic or behavioral problems and avoid referral to special education. Pre-referral meetings are scheduled and conducted on a regular basis and include counselors, regular and special education teachers, and administrators.

SISD's schools also have an aggressive and thorough approach to identifying and providing services to students who qualify under Section 504 of the Vocational Rehabilitation Act. Students who have a disability but do not qualify for special education services (e.g., students with dyslexia or attention deficit disorder) can receive modifications such as modified assignments, extra time to complete work, individual testing, and other accommodations and other services under Section 504. This approach helps reduce the cost of special education by preventing unnecessary assessments and long-term special education placement. SISD's personnel provide ongoing training and keep records of it, to guarantee a consistent level of expertise among staff members. Teachers are required to document their pre-referral interventions.

COMMENDATION

SISD's schools have organized and systematic pre-referral strategies that help to minimize referrals to special education.

FINDING

Texas and many other states encourage districts to include more special education students in regular education environments for most of their academic instruction. Many educators believe this strategy, known as inclusion, improves socialization and academic achievement. When students receive special education services, they are assigned a specific instructional arrangement code based on the amount of time they spend in general education classes.

In Texas, funding for special education students is based in part on these instructional arrangement codes and their relative funding weights. Districts are thereby encouraged to serve students in less restrictive instructional arrangements. In addition, TEA is reluctant to approve residential placements, the most restrictive of all educational environments, except in extreme circumstances.

As of October 1997, 2,281 SISD students were receiving services in the Special Education program; of these, more than half (about 65 percent) were in the Mainstream and Resource instructional arrangement

categories, the least restrictive categories. SISD had no students in residential placement as of October 1997 (**Exhibit 2-31**).

Exhibit 2-31

SISD Students in Special Education by Category

October 1997

Instruction Arrangement	Number of Students	Percent of Students
Speech Only	398	17.4
Homebound	18	<1
Resource	1,304	57.1
Self Contained-Mild, Moderate	66	2.9
Self Contained-Severe	269	11.8
VAC	13	<1
Foster Care	10	<1
Mainstream	180	8
Regional Day School Program for the Deaf	23	1
Total	2,281	100

Source: PEIMS

SISD has several special education programs designed to serve students with disabilities in regular education to the maximum extent possible. These programs include a wide range of instructional options. First, the Class Within a Class model is a coteaching arrangement in which several students with disabilities are placed in the same general education class, which is then cotaught by a special education and a general education teacher. Benito Martinez School, Slider Middle School, and Socorro High School have implemented this program. SISD also uses Content Mastery Centers to assist special education students with classwork.

COMMENDATION

SISD has implemented several programs designed to increase the inclusion of special education students in regular education.

FINDING

SISD's pre-referral intervention teams also identify students who do not qualify for special education but do qualify for services under Section 504 of the Vocational Rehabilitation Act. Students who are identified and served as "504" students receive many of the same accommodations as special education students such as modified assignments, extra time to complete work, individual testing, and have similar procedural safeguards. However, because they are not part of special education system, the district can avoid the costs associated with ARD procedures and separate instruction.

SISD has had few legal complaints related to such services. This may be in part because the district is aggressive in identifying and serving Section 504 students. Regular education teachers in SISD receive the training, support, and materials needed to teach students with learning differences in the regular education environment.

SISD's program includes several components that could be replicated by other districts. First, SISD has two Section 504 counselors who provide training for all teachers in identifying and teaching students with learning difficulties. Second, the district has published and provided a flip chart resource guide as a quick, useful reference for all regular education teachers. Finally, SISD monitors its ongoing training program; Section 504 counselors provide refresher training for all schools on a regular schedule.

COMMENDATION

SISD has an effective program for identifying and serving students who qualify for services under Section 504 of the Vocational Rehabilitation Act.

FINDING

SISD files Medicaid claims for reimbursement under the federal School Health and Related Services (SHARS) program on a quarterly basis. SISD's amount of Medicaid funding more than doubled between 1994-95 and 1996-97, from \$141,355 to \$295,490. SISD pays a flat fee per claim to the Texas Association of School Boards to file its Medicaid claims, which is a common practice among Texas school districts. The special education and student services programs are collaborating to begin participation in a recently implemented Medicaid Administrative Outreach program.

COMMENDATION

SISD is aggressively seeking federal Medicaid reimbursements for services provided to special education students.

FINDING

Despite the work of the district's pre-referral intervention teams, some SISD schools still maintain relatively high special education referral rates (**Exhibit 2-32**). The referral process is expensive and since only about 67 percent of SISD's referrals actually result in placement in special education, non-qualifying referrals should be kept to a minimum. **Exhibit 2-32** also shows the percentage of economically-disadvantaged students at each school.

When a district's referrals to special education and its share of economically disadvantaged students seem to be closely related, the district should examine its compensatory education and Title I expenditures to be sure that they are funding effective at-risk programs. In SISD, the two elementary schools with the highest rates of referral to special education, Escontrias and Rojas, also have the highest percentage of economically disadvantaged students. Similarly, the two secondary schools with highest referral rates to special education, Sanchez Middle School and KEYS Academy, are among the highest secondary schools in their percentage of economically disadvantaged students.

Exhibit 2-32

Students Referred to Special Education by School

1996-97 School Year

School	Enrollment	Number of Referrals	Percent of Referrals	Percent Economically Disadvantaged
Montwood MS	NA	NA	NA	NA
Chavez ES	NA	NA	NA	NA
Escontrias ES	641	34	5.3	91.7
Rojas ES	894	40	4.5	94.4
O'Shea ES	974	33	3.4	51.3
Sanchez MS	965	30	3.1	90.5
KEYS Academy	82	2	2.4	89.0

Hueco ES	540	13	2.4	92.6
Sierra Vista ES	923	22	2.4	53.8
Helen Ball ES	1249	26	2.1	61.8
Hilley ES	745	15	2.0	90.8
Cooper ES	1095	21	1.9	69.3
Vista del Sol ES	783	15	1.9	74.9
Martinez ES	1031	20	1.9	47.9
Clarke MS	977	18	1.8	57.3
Campestre ES	762	13	1.7	93.2
% "> Horizon Heights ES	810	14	1.7	79.1
Slider MS	1327	20	1.5	41.1
Socorro HS	2224	28	1.3	82.1
Socorro MS	924	5	0.5	94.4
Americas HS	1075	5	0.5	52.7
Montwood HS	2723	10	0.4	59.6
Escontrias ECC	624	2	0.3	86.6

Source: AEIS

Recommendation 14:

Provide additional training and support for teachers and administrators in the elementary and secondary schools with the highest rates of referral to special education.

Planning for this recommendation should include principals from schools with the lowest rates of referral to special education. The district should provide updated training in the following areas: examination and restructuring of pre-referral teams; effective modifications and adaptations for students with learning disabilities and Attention Deficit Hyperactive Disorder (ADHD); strategies for identifying and referring at-risk students; collaborative approaches designed to support regular education teachers'

efforts to include special education students in regular classes; and other efforts to establish and support inclusive instructional arrangements.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The director of Student Services, director of Special Education, and principals from schools with the highest and lowest rates of referral to special education meet as a committee to draft a plan for providing additional staff development to schools with the highest referral rates.	May 1998
2	The committee provides those schools with a list of resources other schools have found useful for training and consultation support.	June 1998
3	The schools implement the plan calling for a minimum of two additional days of staff development for targeted schools, including one for the entire staff and one for the pre-referral teams.	August 1998
4	At the end of the year, the committee evaluates the training in terms of effectiveness at reducing referrals and staff satisfaction with the quality of training and level of support.	May 1999

FISCAL IMPACT

The fiscal impact of this recommendation is based on the cost of substitutes for 10 teachers at five schools for one day or \$2,600 annually. The training should take an estimated 50 days (10 teachers x five schools x one day) and cost \$52 for each day requiring a substitute with a bachelor's degree. Training costs can be paid through the \$400 staff development stipend paid to the schools for each teacher.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03	
Provide training for schools with highest rates of referral to special education.		(\$2,600)	(\$2,600)	(\$2,600)	(\$2,600)	(\$2,600)

FINDING

Students in special education can be exempted from the TAAS test in reading, math, and/or writing. If they take some or all of the TAAS tests,

their scores are not included in schools' TAAS passing rates and have no impact on school accountability ratings.

However, Section XI of the 1997 TEA Accountability Manual: Blueprint of the 1998-2000 Accountability Systems, describes anticipated developments. The section states that Special education results would be incorporated into school and district ratings in the 1999 rating cycle by aggregating them into the all students and student group calculations. Legislative proposals to assess special education students with instruments other than TAAS may also impact these plans TEA has made a commitment to increasing the number of special education students whose academic performance is measured and tracked. If special education students' scores are included in accountability ratings, schools may be motivated to exempt more students from TAAS to maintain or improve their passing rates.

Exhibit 2-33 compares SISD's percentage of special education students exempted from the TAAS with its peer districts and the state. SISD ranks fourth highest in math exemptions and third-highest in reading and writing exemptions.

Exhibit 2-33

Special Education Students Exempted from TAAS

1996-1997 School Year

District	Percent TAAS Math Exemptions	Percent TAAS Reading Exemptions	Percent TAAS Writing Exemptions
Pharr-San Juan-Alamo	77.8	77.8	73.5
United	65.7	68.6	70.6
Laredo	56.6	56.6	50.8
Socorro	53.2	57.5	55.3
Texas	40.5	43.8	45.9
Edinburg	31.9	34.5	47.0
El Paso	23.8	25.1	28.9
Ysleta	16.1	18.5	21.2
Southwest	12.1	14.6	20.1

Source: AEIS

SISD's share of special education students who participate in TAAS varies widely from school to school. For example, at O'Shea-Keleher School, only 15 percent of special education students are taking some part of the TAAS in the 1997-98 cycle, while 56 percent of Sierra Vista School's special education students are taking the test. **Exhibit 2-34** shows the percentage of special education students taking the TAAS by school, along with each school's accountability rating. Of the elementary schools, the three with the lowest percentage of special education students taking the TAAS have relatively high accountability ratings. By contrast, Benito Martinez and Hilley schools have relatively high percentages of special education students taking the TAAS and relatively low accountability ratings. It should be noted, however, that not all students at all grade levels take the TAAS, so the percentage of students taking the test at each school depends on the number of students in each grade level. In addition, some schools have special programs and serve students with more severe disabilities from other schools.

Exhibit 2-34

Special Education Students Served, Number and Percentage Taking TAAS,

and Accountability Ratings By School

1997-98 School Year

School	Accountability Rating	# Taking TAAS	# Served	Percent Tested
Escontrias ECC	Acceptable	NA	NA	NA
O'Shea ES	Exemplary	10	71	15
Campestra ES	Exemplary	8	42	20
Vista del Sol ES	Recognized	11	45	25
Horizon Heights ES	Acceptable	11	45	27
Sanchez MS	Acceptable	42	139	31
Escontrias ES	Acceptable	17	54	32
Rojas ES	Acceptable	20	64	32
Hueco ES	Acceptable	10	28	36

Socorro MS	Acceptable	34	96	36
Hilley ES	Recognized	13	35	38
Americas HS	Acceptable	49	126	39
Socorro HS	Acceptable	110	278	40
Helen Ball ES	Acceptable	27	66	41
Montwood HS	Acceptable	76	180	43
Chavez ES	NA	10	23	44
Martinez ES	Recognized	26	55	48
Slider MS	Acceptable	49	104	48
Clarke MS	Acceptable	62	123	51
Cooper ES	Acceptable	32	62	52
Montwood MS	NA	53	100	53
Sierra Vista ES	Acceptable	27	49	56
KEYS Academy	Alternative Ed.	17	29	59

Source: Director of Special Education, SISD; AEIS

In 1996 and 1997, the special education students in SISD who did take the TAAS had higher passing rates than students in all peer districts and the state on all tests, reading, math, and writing. Passing rates for SISD special education students decreased for all tests, reading, and math, and increased for writing from 1996 to 1997 (**Exhibit 2-35**).

Exhibit 2-35

Percent of Special Education Students Passing the TAAS

SISD, Peer Districts, and Texas

1995-96 and 1996-97 School Years

District	All Tests		Mathematics		Reading		Writing	
	1996	1997	1996	1997	1996	1997	1996	1997
Edinburg	9.7	14.3	15.8	23.4	17.4	25.5	21.1	24.0

Laredo	9.8	12.5	15.6	22.9	16.6	23.9	25.5	24.7
Southwest	11.2	10.6	16.3	18.8	22.8	19.7	27.9	26.4
United	11.6	15.9	20.9	25.6	24.8	26.8	21.3	39.5
Pharr-San Juan-Alamo	15.8	30.2	23.5	43.9	23.1	41.5	25.4	28.2
Ysleta	17.7	25.6	27.6	38.8	34.5	40.5	33.5	38.1
El Paso	18.5	17.0	24.5	25.5	33.9	32.1	35.6	33.1
Texas	27.8	31.1	36.7	41.8	44.3	47.1	43.0	44.5
Socorro	42.7	37.3	53.3	44.6	58.9	55.8	51.0	59.3

Source: AEIS

Recommendation 15:

Create a task force to develop a long-term strategic plan to decrease the share of special education students exempted from TAAS.

The task force should complete a school-by-school analysis of special education exemptions, by grade level; use this analysis to pinpoint grade levels and teaching teams with the highest exemption rates; and determine whether students' disabilities warrant an alternate assessment. The task force also should set a three-year goal of reducing TAAS exemptions for students in the Learning Disability, Speech Impairments, Other Health Impaired, and Emotional Disturbance categories, since the tests should be more appropriate for those students than those in other categories. The district should require more special education students to take the practice tests, so that they gain experience and become comfortable with the testing process, and select alternate assessments for students who are likely to remain exempt from the TAAS, within TEA's suggested guidelines.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The assistant superintendent of Instruction appoints a task force including the directors of Special Education and Student Services to analyze exemptions by school, grade level, and team.	April 1998
2	The task force develops a long-range strategic plan to reduce the percentage of exemptions and develop alternative assessments for exempted students.	May - August 1998

3	The task force meets with principals to review the plan, obtain feedback and suggestions, and develop implementation strategies.	September 1998
4	Principals develop and produce school plans designed to implement the task force's long-range strategic plan.	September - May 1999
5	Principals implement their school-based plans.	August 1999
6	Principals evaluate their effectiveness and report to the task force.	May of each year

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

In the past three years, SISD has had five legal cases related to special education. Legal fees for these cases ranged from \$5,000 to \$30,000 each. One complaint filed in September 1997 is still pending at this writing. While this number of cases is not inordinately high, the superintendent expressed his concern to the review team about current statewide trends toward increased special education litigation and the excessive costs involved.

Several Texas districts face very high legal expenses related to special education. For example, within one two-year period, Corpus Christi ISD (CCISD) had more than 40 complaints related to special education filed against them. CCISD spent more than \$245,000 in the 1995-96 school year on legal fees related to special education complaints and due process hearings. As SISD grows and its population of special education students increases, it is likely to face more special education complaints. The district can minimize the fiscal impact of such litigation by taking steps to deal with complaints before they escalate to a hearing or mediation.

Recommendation 16:

Designate a parent-school liaison for special education and make this part of the employee's ongoing duties.

This employee should have experience with children with disabilities and their families.

Duties for this position include maintaining ongoing communication with families of students in special education, including regular telephone

contacts and home visits; sharing parental concerns with principals, teachers, assessment personnel, and other special education staff; and sharing information with parents about available programs and services. The liaison also should network in the community with advocacy groups and other service providers like the Texas Department of Mental Health and Mental Retardation and the Texas Rehabilitation Commission.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The director of Special Education and the director of Human Resources writes job responsibilities for this position.	May 1998
2	The directors interview and assign a special education staff member to this position.	June 1998
3	The parent-school liaison is trained and begins to work.	August 1998

FISCAL IMPACT

The fiscal impact of this recommendation is based on a stipend in addition to the designated person's salary. The amount is based on other stipends paid to teachers, coaches, and other staff on SISD.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Designate a parent-school liaison for special education.	(\$5,000)	(\$5,000)	(\$5,000)	(\$5,000)	(\$5,000)

Dyslexia

Dyslexia is defined by the Texas Education Code as a disorder of constitutional origin manifested by a difficulty in learning to read, write, or spell despite conventional instruction, adequate intelligence, and sociocultural opportunity. The most common manifestation of dyslexia is difficulty with reading.

In Texas, students with dyslexia and related disorders may qualify for services under Section 504 of the Rehabilitation Act of 1973. This federal law is a civil rights statute designed to protect a qualified person with a disability from discrimination in any program receiving federal funding. Under Section 504, reasonable modifications must be made if a person's disability interferes with his or her normal functioning. "Reasonable"

modifications in schools include modified assignments, extra time to complete work, individual testing, and other accommodations.

If a student has severe dyslexia and is unable to make adequate academic progress in a regular education environment, he or she can be referred for special education evaluation. If the student has a learning disability as defined by special education rules and regulations, he or she must be provided for under the Individuals with Disabilities Education Act just as for any other student in special education.

Texas has provisions related to services for students who are dyslexic. According to 19 TAC 74.28, school districts must provide appropriate identification procedures, including screening by trained professionals; appropriate instructional services delivered by a trained teacher; notification of parents or guardian before assessment; parental information about available services; and a program for early identification and intervention. In addition, districts may provide parental education programs.

In the past three years, the number of students identified and served in SISD's dyslexia program has risen from 522 students to 652 students (**Exhibit 2-36**), a figure representing 3 percent of the district's student population. More than half of the dyslexic students receiving services are in the first through third grades. This is consistent with the main characteristics of the disorder, which include reading problems that become evident after kindergarten.

Exhibit 2-36

Number of Dyslexic Students Served by Grade

1994-95, 1995-96, 1996-97

Grade	1994-95	1995-96	1996-97
K	0	0	0
1	54	54	60
2	122	144	166
3	117	134	164
4	105	112	91
5	76	80	70
6	40	41	21

7	7	38	33
8	1	9	41
9	0	0	8
10	0	0	2
11	0	0	1
12	0	0	0
Total	522	612	657

Source: Director of Special Education

FINDING

SISD's dyslexia program, called the Specific Reading Difficulty (SRD) program, involves identification and remediation procedures that are outlined in its program manual. SISD has a clearly defined referral process, after which students are given a oral reading test. An SRD Committee then meets to consider data including the oral test scores, standardized test scores, work samples, and anecdotal reports from teachers. The district uses a qualifying table, similar to those often used for identifying gifted students, which summarizes and assigns weights to each unit of information.

After admission to SRD, students continue to receive reading instruction with their regular class, but also receive specialized instruction using an ISM Teaching Systems, Inc. curriculum. This curriculum tracks students' progress with a continual teaching assessment process.

SISD maintains a program calendar for its SRD program that details activities related to the program for the entire school year. Among its regularly scheduled activities is one day of training for all teachers each year. In addition, the district post-tests students and distributes that information to teacher representatives on the SRD team.

Characteristics of the program that other districts can replicate include a well-designed identification system that includes data from several sources; a tracking system to monitor students' entry, exit, and progress; a long-term plan that includes dates and topics for training and dissemination of information; and required staff development for all teachers related to dyslexia.

COMMENDATION

SISD's program for students with dyslexia has all required components as well as several additional features that enhance student success.

Chapter 2

COMPENSATORY EDUCATION/TITLE I

Funds for compensatory education are based on an allocation of state and local funds within the State Foundation School Program and funds for Title I are based on an allocation from the federal government that flows through TEA. Title I, of the Elementary and Secondary Education Act, was originally enacted in 1965 and serves as the largest federal aid program for elementary and secondary schools. This initiative funnels approximately 7 billion dollars to school districts throughout the nation. School districts are to use Title 1 funds to provide supplemental services designated to improve the educational performance of low achieving students in high poverty schools. The amount of money a district receives is calculated based on the previous year's number of students receiving free and reduced-price lunch as reported by the Public Education Information Management System (PEIMS). According to Texas Education Code, section 29.081, Subchapter c, school districts are to evaluate and document the effectiveness of the ways they use this money to enhance the educational experiences of their students who are at-risk, and reducing the number of drop-outs and increasing student performance.

CURRENT SITUATION

SISD is allotted about \$6 million in state and local compensatory education funds and about \$5 million in Title I funds during the 1996-97 academic year.

SISD students are identified as "at risk" using the following procedures. Each school has a committee consisting of a counselor, a nurse, an administrator, and teachers that is responsible for identifying at-risk students. Committee members receive regular training, under the director of student services, in the rules and regulations associated with their task. Each committee turns in a monthly report of at-risk students and the indicators under which they qualify. The district uses this information to organize the information by grade, school, and indicators. The director of Student Services is responsible for ensuring that all at-risk students are identified.

Compensatory education funds provide support for students who are at risk of dropping out of school or are not performing satisfactorily in an academic setting. Compensatory education funds pay for elementary school counselors for students; measures to reduce the pupil/teacher ratio in bilingual education classes in grades 1 through 5; services, materials, and personnel to serve students at SISD's KEYS Academy; and

accelerated instruction classes for secondary students at risk of dropping out or failing the exit-level assessment. These classes include TAAS Labs, MAP classes, and classes for pregnant teens (Project Recovery). In addition, SISD received additional compensatory education to provide remedial support classes during intersessions.

Until November 1996, only SISD schools with more than half of their students receiving free and reduced-price lunches were entitled to Title I funds. In November 1996, SISD filed a waiver with the state requesting that its other schools be designated Title I as well. The waiver was granted and at present all schools in the district are designated as Title I schools. This means funds received through Title 1 may be used to serve all students on a campus, not just students identified as receiving free or reduced lunch.

FINDING

SISD has a very low dropout rate, well below those of Region XIX and Texas as a whole
(Exhibit 2-37).

Exhibit 2-37

Dropout Rate, SISD vs. Region XIX and Texas

1994-95 to 1996-97 School Years

	1994-95	1995-96	1996-97
SISD	0.6	0.8	0.4
Region XIX	2.4	1.8	not available
Texas	1.8	1.8	not available

Source: AEIS

SISD's teen pregnancy program, Project Recovery, is directed by the special populations counselor at Socorro High School. The program, which contracts with private day care centers for the care of teen mothers babies, has been very successful. The director of the program estimates its retention rate to be about 85 percent with a graduation rate of 90 percent.

The program uses several strategies that can be replicated by other districts. Some of these include allowing girls to attend their home

schools; working closely with each girl and developing an individual plan that may include a reduced course load or a cooperative working situation; using the Career and Technology Education program to assist girls in acquiring work skills; and providing transportation to and from school for the girls and their babies.

COMMENDATION

Project Recovery is an exemplary program that assists teenage parents in acquiring high school diplomas and work skills.

FINDING

One of the SISD programs funded by Title I is the HOSTS (Help One Student To Succeed) program at Myrtle Cooper School. HOSTS serves first- through fifth-grade students who need additional help in Reading and Language Arts. Students who participate in HOSTS are referred by a pre-referral committee and are educated in regular classrooms. Students are given an information reading inventory and qualify for services if they are below their grade level in reading. Each student has a personalized prescription for remediation based on the Reading Objective Inventory.

While HOSTS is a licensed program widely available throughout the United States, the program at Cooper has some unique features. Individuals who work with students in the HOSTS lab include teachers, parents, police officers, and community volunteers. The most numerous mentors, though, are 37 student tutors who volunteer to work with students their own age or younger. In April 1997, Cooper's HOSTS program earned national recognition through its selection as an Exemplary Site.

COMMENDATION

The HOSTS program at Myrtle Cooper School provides a mentoring program for students who are below grade level in reading and language arts.

The program's use of student mentors as tutors is an excellent strategy for improving reading achievement.

FINDING

As of October 28, 1997, SISD had 9,504 at-risk students. According to TEA, students may be coded as at risk according to several indicators. For students in grades 7-12, these indicators include failure to advance from one grade level to the next for two or more school years; mathematics or

reading skills two or more years below grade level; failure to maintain a 70 average in two or more courses during a semester by a student not expected to graduate within four years of ninth grade; unsatisfactory performance on the TAAS; or pregnancy or parenthood. For grades Pre-K-6, the indicators are unsatisfactory performance on a readiness test or assessment instrument; unsatisfactory performance on TAAS; LEP status; evidence of sexual, physical, or psychological abuse; or conduct described by Section 51.03(a), Texas Family Code. For all grades, a student who is not disabled but resides in a residential placement facility, such as a detention center, foster family, or group home, in a district in which the parent or legal guardian does not reside, is considered at risk.

Exhibit 2-38 illustrates the amount of money each SISD school receives from compensatory education, the percent of the school's budget these funds represent, the number of students identified as at risk, and the number identified as economically disadvantaged. In examining **Exhibits 2-38 and 2-40** it should be noted that the at-risk numbers were obtained for the 1997-98 academic year, while the budget information and percent of economically disadvantaged students were obtained for the 1996-97 academic year. Therefore, two new schools, Chavez Elementary and Montwood Middle School are not included in **Exhibit 2-38**.

As **Exhibit 2-38 and 2-40** illustrate, the amount of compensatory education funds a school receives is not related to the percent of at-risk students at that school. In fact, in many cases, a school with a low share of at-risk students receives a large portion of compensatory education funds. The majority of compensatory education funds pay for salaries, and it may be that this discrepancy is due in part to salary differences between schools. For example, at the high school level, compensatory funds are allocated depending on the number of remedial courses offered at each school. A school with a large number of remedial courses taught by experienced teachers will have a higher allotment than a school with fewer remedial courses taught by less-experienced teachers.

Much of the district's compensatory funding is spent on remediation at KEYS Academy and secondary remedial courses. While remediation is important, early intervention (before third grade) has shown long-term positive effects on achievement and social development.

Exhibit 2-38

Compensatory Education Funds,

At-Risk Students, Economically Disadvantaged Students

School	Compensatory	Percent of	Percent of	Percent
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	Education Funds	School Budget	School Students At Risk	Economically Disadvantaged
Americas HS	\$133,389	4.3	35	52.7
Montwood HS	\$799,311	11.7	19	59.6
Socorro HS	\$645,689	9.1	39	82.1
Total HS	\$1,578,389			
Clarke MS	\$462,674	18.3	8	57.3
Sanchez MS	\$530,878	20.6	32	90.5
Slider MS	\$440,136	15.4	12	41.1
Socorro MS	\$467,998	18.7	40	94.4
Total MS	\$1,901,686			
Helen Ball ES	\$125,570	5.7	31	61.8
Martinez ES	\$33,158	1.7	37	47.9
Sierra Vista ES	\$155,199	9.0	45	53.8
Cooper ES	\$90,667	4.5	47	69.3
O'Shea Keleher ES	\$141,320	7.4	47	51.3
Vista Del Sol ES	\$113,547	6.2	58	74.9
Horizon Heights ES	\$156,305	9.8	62	79.1
Hilley ES	\$176,946	12.1	63	90.8
Rojas ES	\$176,447	9.3	64	94.4
Escontrais ECC	\$183,297	17.1	67	86.6
Hueco ES	\$121,599	9.5	71	92.6
Campestra ES	\$229,564	14.4	80	93.2
Escontrias ES	\$136,050	26.9	80	91.7
Total ES	\$1,578,389			
KEYS Academy	\$632,106	64.4	100	89.0

Source: AEIS and coordinator of Title I, 10-28-97

SISD's elementary schools contain 68 percent of the total at-risk population and yet receive only 31 percent of compensatory education funds. SISD states that it uses compensatory education funds to reduce class sizes in its bilingual grades 1 and 5 classes. Specifically, the pupil/teacher ratio goal for first-grade bilingual classes is 18:1 and 25:1 for grade 5 bilingual classes. In reality, however, 43 percent of grade 1 bilingual classes and 29 percent of grade 5 bilingual classes are above this ratio (**Exhibit 2-39**).

Exhibit 2-39

Grade 1 and 5 Bilingual Classes Below or Equal to

28:1 AND 25: 1 Pupil:Teacher Ratio and Above Pupil:Teacher Ratio

Grade	Less Than or Equal to Pupil:Teacher Ratio Goal		Above Pupil:Teacher Ratio Goal	
1	28	57%	21	43%
5	10	71%	4	29%

Source: SISD school reports to administration, 11-5-97

When the review team asked district officials about the large number of BE classes above the target ratio, they were told that classes above the stated pupil/teacher ratio receive a teacher aide. However, the salary of these aides is not paid from compensatory education funds.

Secondary schools, including middle schools, high schools, and the alternative education school, contain 32 percent of the at-risk population and receive 69 percent of compensatory education funds (**Exhibit 2-40**).

Exhibit 2-40

Total Compensatory Education Funds, Percent of Total Compensatory Education Funds, and Percent of Total at-Risk Students for Each Level

Level	Total Compensatory Education Funds	Percent of Total Compensatory Education Funds	Percent of Total At-Risk Students
Elementary	\$1,832,669	31	68
Middle	\$1,901,686	32	12

School			
High School	\$1,578,389	27	18
KEYS Academy	\$632,106	11	2

Source: AEIS and coordinator of Title I, 10-28-97

Recommendation 17:

Redirect a portion of the district's compensatory education funds to the elementary schools for early intervention programs in reading and mathematics.

Reading and mathematics were chosen since the district is behind the state in TAAS reading and mathematics passing rates

:

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The superintendent, the assistant Superintendent for Instruction, principals, and a group of teachers should meet to determine how to best address reading and the mathematics needs of their at-risk students.	May 1998- August 1998
2	The assistant superintendent for Instruction and the budget clerk decide how to redirect compensatory education funds to the appropriate programs.	May 1998- August 1998
3	The funds are redirected.	September 1998

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

Chapter 2

CAREER AND TECHNOLOGY EDUCATION

According to the Texas Education Code, Section 29.181, each Texas school district must offer career and technology education to its students to help them manage the dual roles of family member and wage earner and gain entry-level employment in a high-skill, high-wage job or continue on to post-secondary education.

Schools must ensure they provide the curriculum needed to produce a workforce that can support economic growth in their regions. To accomplish this goal, educators must begin by examining the top industries in their region and emphasizing the connection between school and work. The Upper Rio Grande Tech Prep/School-to-Work Consortium's list of top occupations for SISD's region include auto repair; business services; communications; educational services; electricity, gas, and sanitation services; electronics and electronic services; engineering and accounting services; general building construction; health services; personal services; rubber and plastics; social services; special trade construction; trucking and warehousing; and wholesale trade-durables.

In addition to this information, the Bureau of Labor Statistics identified the ten fastest-growing non-college occupations for the years 1994 to 2005. These are personal and home care aides (expected to grow by 119 percent by 2005); home health aides (102 percent); physical and corrective therapy aides (83 percent); electronic pagination system workers (83 percent); occupational therapy assistants and aides (82 percent); human services workers (75 percent); manicurists (69 percent); medical assistants (59 percent); amusement and recreation attendants (52 percent); and correction officers (51 percent).

CURRENT SITUATION

SISD's Career and Technology (C&T) Education program is coordinated by the director of Career and Technology Education. Each of the three high schools has a special populations coordinator who reports to the director. A certified vocational counselor, in charge of assisting all special populations in the school, fills the coordinator position. During the 1997-98 school year, five C&T programs, five C&T magnet programs and 12 Individualized vocation education courses (for students with disabilities) are being offered at the three high schools and the alternative school. SISD's Career and Technology five major programs are illustrated in **Exhibit 2-41**; the five magnet programs will be discussed later.

Exhibit 2-41

SISD Career and Technology Programs

1997-98 School Year

Program	Description	Number of Courses
Business/Office Education	Instruction emphasizing new and emerging technological occupations. Major tasks focus on effective oral and written communication; the preparation and analysis of business records; operation of office equipment and software; and development of attitudes, knowledge, and skills needed to interact successfully with others.	12
Health Science Technology	Integration of natural and social sciences to develop concepts related to many health careers. Course content includes laboratory and community-based experiences as well as technological advances related to the health care industry.	4
Home Economics Education	Sequential courses that provide skills in successfully managing individual, family, work, and community roles.	19
Industrial Technology Education	Courses in the role and influence of technology in the community and its influence on everyday life. Focuses on the evolution, application, and significance of modern technology and its relationship to American industry.	7
Trade and Industrial Education	Five major industrial areas are explored including construction, manufacturing, transportation, communication, and public/private industrial services. Instruction is provided in layout, design, production, processing, assembling, testing, maintenance, and service of industrial, commercial, and residential goods and products. Courses in public service such as law enforcement also are included in this program.	31

Source: SISD Catalog of Career & Technology Courses

In addition to the five C&T programs, SISD's career and technology education program participates in several shared services arrangements (**Exhibit 2-42**).

Exhibit 2-42

Shared Services Arrangements, SISD Career & Technology Program

1997-98 School Year

Shared Service Arrangements of the Career & Technology Program
A contract with Clint ISD under which SISD provides career and technology training for 30 to 50 Clint students.
Participation in a multidistrict educational cooperative with El Paso, Ysleta, and Canutillo ISDs and the Upper Rio Grande Tech Prep School to Work Consortium. Participants in the cooperative pool their funds to provide information and recruit potential career/technology students.
SISD provides training for the Upper Rio Grande Tech Prep School to Work Consortium; Tech Prep pays to send a teacher to the training.
During their senior year, SISD students act as interns in six different departments in local auto dealerships.
Local restaurants provide training for SISD's Vocational Education for the Handicapped program. Students spend three hours, three days a week, working at restaurants.
SISD students in the auto technician program attend class every Friday at El Paso Community College as part of their training.
SISD students in construction carpentry gain experience and perform community services with the City of Socorro, working to rebuild community centers.
Students in the construction carpentry program also work with UTEP. They participate in a program, Commercial Real Estate, that is funded by a state grant and receive training in building low-cost efficient housing in the area.

Source: Director of Career & Technology, SISD

The percentage of SISD students participating in C&T education at Socorro and Montwood High Schools fell between the 1993-94 and 1995-96 school years. The number of students taking the ACT or the SAT at Socorro High School increased slightly from 1993-94 to 1995-96 but fell by 10 percent at Montwood High School (**Exhibit 2-43**).

Exhibit 2-43

Share of Students Taking ACT/SAT; Share of Students in Career and Technology

SISD High School Students

1993-94 - 1995-96 School years*

	Socorro HS			Montwood HS		
	93-94	94-95	95-96	93-94	94-95	95-96
Percent in Career and Technology	61.7	60.9	57.9	54.7	53.4	50.2
Percent taking ACT or SAT	39.4	34.3	39.5	67.9	65.5	57.1

*1995-96 is the last data available on AEIS for ACT/SAT due to reporting changes in this category.

Source: AEIS

Among its peer districts, SISD has the third-highest percentage of students in C&T (**Exhibit 2-44**) and the second-highest total expenditures on C&T (**Exhibit 2-45**).

Exhibit 2-44

Students in Career and Technology

SISD vs. Peer Districts

1996-97 School Year

District	Number of Students	Percent
Southwest	1,770	19.2
Edinburg	3,657	19.1
Socorro	3,010	14.3
El Paso	9,211	14.3
Ysleta	5,095	10.8
Pharr/San Juan/Alamo	1,936	9.5
United	1,877	8.8

Laredo	1,920	8.4
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Source: AEIS

Exhibit 2-45

Career and Technology Expenditures

SISD vs. Peer Districts

1996-97 School Year

District	Expenditures	Percent
Edinburg	\$3,285,416	5.9
Socorro	\$2,686,031	5.3
Ysleta	\$5,232,105	4.1
Southwest	\$1,043,339	4.1
Laredo	\$2,196,572	3.4
Pharr/San Juan/Alamo	\$1,789,395	3.0
El Paso	\$3,964,304	2.4
United	\$1,097,105	2.2

Source: AEIS

SISD ranks in the middle of its peer districts in terms of C&T expenditures per student (Exhibit 2-46).

Exhibit 2-46

Career and Technology Expenditures; Students Served

SISD vs. Peer Districts

1996-97 School Year

District	Expenditures	Students Served	Expenditures per Student
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Laredo	\$2,196,572	1,920	\$1,144
Ysleta	\$5,232,105	5,095	\$1,027
Pharr/San Juan/Alamo	\$1,789,395	1,936	\$924
Edinburg	\$3,285,416	3,657	\$898
Socorro	\$2,686,031	3,010	\$892
Southwest	\$1,043,339	1,770	\$589
United	\$1,097,105	1,877	\$584
El Paso	\$3,964,304	9,211	\$430

Source: AEIS

SISD's total budget for C&T education did not change significantly from 1993-94 to 1996-97 (**Exhibit 2-47**). However, the number of students served increased while expenditures per student fell.

Exhibit 2-47

Career and Technology Expenditures; Students Served

1993-94 Through 1996-97

	1993-1994	1994-95	1995-96	1996-97
Career and Technology Expenditures	\$2,580,796	\$2,804,579	\$2,808,025	\$2,686,031
Career and Technology Students Served	2,581	2,662	2,649	3,010
Expenditures per Student	\$1,000	\$1,054	\$1,060	\$892

Source: AEIS

Socorro High School has the largest career and technology education program and thus devotes the largest percentage of its program expenditures to C&T (**Exhibit 2-48**). Expenditures at middle schools are low; only one C&T course, Career Investigations, is offered at that level.

Exhibit 2-48

Career and Technology Expenditures by School

1996-97 School Year

	Expenditures	Percent of School Program Expenditures
Socorro HS	\$1,439,740	20.3
Montwood HS	\$475,481	13.2
Keys Academy	\$104,193	10.6
Americas HS	\$215,056	6.9
Socorro MS	\$6,000	0.2
Sanchez MS	\$6,000	0.2
Slider MS	\$6,000	0.2
Clarke MS	\$6,000	0.2

Source: AEIS

FINDING

Prior to the 1990s, students in Texas and across the nation typically began health occupational programs as juniors or seniors in high school. Unfortunately, many of these students lacked the strong academic background necessary to be successful in these careers. SISD has begun health occupational training in the freshman year and assists students in developing the academic background needed to compete in the health care industry. SISD's four-year, in-school magnet program, Health Professions Academy, began in the 1991-92 school year.

The program combines academic and vocational work. During the first semester, students take a course in health careers that provides information about 400 health-related careers. In the second semester, they take a medical terminology course. In their sophomore year, students take a two-credit laboratory course during which they rotate through laboratories related to rehabilitation, CPR and first aid, blood work, and urinalysis. During their junior year, students are broken into groups of 25 and rotated through nine different stations at a local hospital. These stations last for three weeks and include surgery, human resources, and radiology. Seniors have three options, independent research, a health cooperative job, or a preceptorship (mentorship). The preceptorship is for students who are interested in a particular area such as surgery or radiology. In the preceptorship, students must commit to work 15 hours a week.

In 1994, the U.S. Department of Education selected SISD's Health Professions Academy as one of the nation's most innovative vocational programs.

COMMENDATION

SISD has an innovative and successful Career and Technology Academy for health occupations.

FINDING

Socorro's four-year Naval Junior Reserve Officers Training Corp Unit at Socorro High School is designed to build leadership and citizenship in participating cadets. This is done through a broad social-science academic approach and a practical, guided leadership experience in naval organization and administration of the unit.

Socorro's N.J.R.O.T.C. program emphasizes each person's responsibilities in American society. The program includes classroom study, physical fitness, respectful conduct, good personal appearance and leadership training. Cadets learn problem-solving and research skills. In addition to normal military drills, the unit also trains color guards, armed and unarmed drill teams, physical fitness teams and a rifle team.

N.J.R.O.T.C is a jointly sponsored program between the Navy and selected high schools. Socorro's program was ranked No. 1 in the nation in 1995 and in the top 5 percent nationally for 10 consecutive years.

COMMENDATION

SISD's N.J.R.O.T.C. is a jointly sponsored program with the Navy that provides students an opportunity to learn practical leadership skills.

FINDING

Two magnet C&T programs offered at Socorro High School are the Bridging the Educational Scene for Teachers of Tomorrow (BESTT) Academy and the Academy of Business Careers (ABC). The BESTT Academy requires students to complete an internship during the junior year in which they become "helping teachers" for 10 hours a week. The ABC program includes a strong technology component.

In addition, Socorro offers a full range of other C&T courses in their vocational building and other areas of the school. The vocational building

is large, attractive, safe, and offers excellent facilities and equipment. Programs include microcomputers and business applications, printing, auto mechanics, carpentry, building trades, cosmetology, electrical trades, media and film editing, and theater arts. Socorro's C&T program also includes, as part of the Individualized Vocational Education classes, a building maintenance program for students with disabilities.

Socorro High School's Media Production classes are aimed at developing communication skills for the business and professional arena. Classes involve script writing, video and audio production and editing, studio operations, and field work. Students get hands-on experience with broadcast-quality equipment and direct and produce their original programming ideas from beginning to end. The student's work also enhances communication among the more than 2,000 students at Socorro High School as the student's work is shown daily on the campus' closed circuit television system.

Americas High School houses another magnet C&T program, the Inter-American Magnet Program for Global Commerce and Trade. This program focuses on international business, with an emphasis on high-tech industries and close relationships with the business communities in Mexico, Latin American countries, and Japan. The curriculum includes courses in international studies, international business and economics, cross-cultural communications, and foreign languages. The district is negotiating with higher education institutions for dual credit agreements.

Another magnet C&T program housed at Montwood High School, involves small groups of students who are selected as freshmen and who remain together for all four years of school. The program focuses on computer technology and includes an integrated curriculum and project-based learning. Montwood High School also has a program that builds computer hardware and has provided upgrades and rebuilt computers for other district schools at costs below those of other vendors.

Still another program offered at Montwood High School, Synergy, includes students with all levels and ranges of ability. These students take their core courses (English, Social Science, Science, and Math) together and spend most of their day in a "school within a school" area, developing close relationships with their teachers and working together in cooperative learning groups. The administration reports that TAAS scores of students in this program improve significantly.

Finally, Montwood High School includes special education students in its C&T program. These students operate a canteen and a frozen yogurt stand patronized by other students in the school.

COMMENDATION

SISD offers a wide range of career and technology courses including several magnet programs designed to meet the needs of the business community as well as to provide options for students who do not choose to pursue higher education.

Chapter 2

GIFTED AND TALENTED EDUCATION

Gifted and talented (G/T) education, unlike special education, is not federally mandated. It is required by Texas Education Code, 29.122 and 42.156(b). Texas defines the gifted and talented student as a child or youth who performs at or shows the potential for performing at a remarkably high level of accomplishment when compared to others of the same age, experience, or environment and who: exhibits high performance capability in an intellectual creative, or artistic area; possesses an unusual capacity for leadership; or excels in an academic field.

Texas funds G/T education at a 0.12 weight for up to 5 percent of the student population; in other words, districts receive an additional 12 percent of their state Average Basic Allotment funding for up to 5 percent of their student populations.

FINDING

One persistent problem in gifted and talented (G/T) education is the underrepresentation of certain subgroups, particularly minority populations. According to Texas' rules and regulations, a district is considered exemplary if its G/T population reflects its student population. SISD has a student population that is 89 percent Hispanic and 52 percent LEP. In 1995-96 and 1996-97, the share of Hispanic students served in SISD's G/T program increased to levels approaching overall district representation; moreover, the district also has a large number of LEP students in the G/T program (**Exhibit 2-49**). These results may, in part, be a result of the expertise of the director of the Gifted and Talented and Bilingual Education programs in assessing the abilities of bilingual students.

Exhibit 2-49

Students Served in the Gifted and Talented Program

Selected Subgroups

1995-96 and 1996-97

Subgroup	1995-96		1996-97	
	Number	Percent	Number	Percent

Male	940	54	957	53
Female	790	46	847	47
Special Education	41	2	36	2
LEP	422	24	355	20
Hispanic	1,295	75	1,406	78
Anglo	391	23	355	20
African-American	28	2	27	1

Source: Director of Instruction, SISD

Exhibit 2-50 illustrates SISD's current procedures for identifying students as G/T.

Exhibit 2-50

Procedures Used to Identify Students as Gifted and Talented

1997-98 School year

Procedures Used in Identifying G/T
Students are nominated for the G/T program by teachers, counselors, administrators, parents, or other members of the community.
Students are administered the following three standardized instruments: Raven, California Achievement Test 5 (CAT5) or Spanish Assessment of Basic Education II (SABE II), and Torrance Test of Creativity.
Teachers complete a rating scale on nominated students called the Scale for Rating Behavioral Characteristics of Superior Students.
Parents complete a rating scale which varies depending on the age of the student.
Students' grade-point average and a student product or interview are used as well.
All seven sources of data are placed on a profile sheet and a committee of at least three individuals with training in G/T meet and review all data. The district uses cutoff scores for each measure to determine whether a student meets a particular criterion. Cutoff scores are as follows: 90 percentile rank on the Raven or the Torrance; 95 percentile rank on the CAT5 or the SABE II; a raw score of 27 on the Renzulli; a raw score of 4 on the student product; a GPA of 90; or a raw score of 70 on the parent inventory.
In order to be placed into the G/T program, a child must meet at least five out of

the seven criteria.

Source: Director of Gifted and Talented Program, SISD

SISD's use of a reasoning ability instrument which uses no language (Raven), an achievement measure in Spanish, and the director's expertise in assessing LEP students all contribute to the district's success in identifying gifted and talented students from ethnically and linguistically diverse backgrounds.

COMMENDATION

SISD successfully identifies and serves gifted and talented students from ethnically and linguistically diverse backgrounds.

FINDING

Between 1994-95 and 1996-97, SISD increased its percentage of students identified for G/T from 7.6 to 8.8 percent. (**Exhibit 2-51**). According to the district, this increase was due in part to a misunderstanding concerning its identification procedures. The director of the G/T program told the review team that this problem has been rectified and that coordinators at each school are aware of the correct identification procedures.

Exhibit 2-51

Number of Students Served in the Gifted and Talented Program by School 1994-95 - 1996-97

School	1994-95	1995-96	1996-97
Escontrias ECC	16	0	25
Rojas ES	37	58	58
Hilley ES	91	35	27
O'Shea ES	59	84	68
Campestra ES	68	58	40
Horizon Heights ES	34	46	42
Vista Del Sol ES	43	57	42

Hueco ES	29	50	33
Myrtle Cooper ES	76	102	88
Escontrias ES	72	80	78
Martinez ES	80	83	72
Sierra Vista ES	45	55	54
Helen Ball ES	NA	124	113
Socorro MS	86	124	172
Sanchez MS	76	104	112
Slider MS	124	169	235
Clarke MS	139	182	101
Socorro HS	123	112	126
Montwood HS	233	206	186
KEYS Academy	NA	1	2
Americas HS	NA	NA	130
Total	1,431	1,730	1,804
Percent	7.6	8.9	8.8

Source: Director of Instruction, SISD

There are two problems with over identifying students for gifted programs. First, the state only funds gifted services for up to 5% of a district's student population. Second, students identified may not be gifted.

Since the state only funds up to 5% of the student population, the gifted program in SISD is being funded, in paid with local funds. This is not necessarily a problem if a district actually has a large number of gifted students that it serves in a quality program. However, several middle school principals stated that many of the already identified gifted elementary students entering their schools are not working to the potential of gifted students. When students entering a G/T program do not work to the potential of gifted students, the result is either to make the standards of the G/T program less stringent or exit students from G/T. Making the requirements less stringent defeats the purpose of having a G/T program and exiting students may cause resentment among parents. The district, therefore, should modify its identification procedures for its G/T program to make sure the students identified are those that should be identified.

The state requires a district to use a minimum of three measures as criteria for identifying G/T students. SISD purchases testing instruments (Raven, California Achievement Test 5, Spanish Assessment of Basic Education II, Torrance) and scores them for the G/T program only. Teachers must be specially trained to score many of these measures, in particular the Torrance test.

Recommendation 18:

Streamline the identification procedure for the G/T program.

In doing so, the district should consider the type of service students will receive when identified, to ensure that identification procedures match the service (i.e., if the district has a G/T mathematics program, the identification procedure should identify gifted mathematics students), and the length of time needed for G/T coordinators to collect and assemble the selection criteria. The district also should consider Texas rules and regulations applicable to the identification of G/T students. A final consideration is the degree to which the district succeeds in collecting information using some of the instruments. For example, do all teachers complete the Scale for Rating Behavioral Characteristics of Superior Students in a timely fashion?

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The G/T director, school coordinators, and program evaluation specialist evaluate the district's identification procedures in terms of time, collection success rate, and variability of criteria in selecting students.	April 1998-December 1998
2	The G/T director and school coordinators develop an alternative identification plan based on the results of the evaluation and pilots it in half the district's schools.	December 1998-April 1999
3	The G/T director, school coordinators, and program evaluation specialist evaluate both identification procedures and compare the results.	May 1999-December 1999
4	The G/T director and school coordinators use the identification procedure with the best results.	December 1999-April 2000

FISCAL IMPACT

The fiscal impact of this recommendation is based on the costs of the instruments the district decides to delete or retain. Since this will be a minimal cost, this recommendation can be accomplished within existing resources.

FINDING

Each SISD school has its own G/T coordinator. This coordinator receives a \$1,000 stipend to facilitate testing and programmatic issues for his or her school. SISD states in its G/T handbook that students identified as gifted in grades K-8 will be served in the regular classroom with the exception of a 45-minute activity period, during which the G/T students will be served in a homogeneous setting (i.e., with other G/T students) and provided enrichment, which is instruction beyond the regular education curriculum. According to the handbook, students in grades 9 to 12 receive instruction in two-hour block periods. The G/T director told the review team, however, that this handbook is outdated and is being modified to reflect the current program.

In reality, each school serves G/T students differently depending on its G/T coordinator; program and curricular decisions for SISD's gifted program vary from school to school. For example, Cooper Elementary serves G/T students for 120 minutes a week. Four teachers work together as a team, each teaching a different discipline such as art, technology, or science. Students rotate through the four teachers. Chavez Elementary serves gifted students for 105 minutes a week. Teachers volunteer to teach G/T for a six-week period and use a unit approach; in other words, students stay with the same teacher for the six-week period. Variances in programs illustrated by these two examples are repeated throughout the district.

In addition, SISD has no curriculum for G/T other than that which each school G/T coordinator develops or compiles. A curriculum should include long- and short-term goals; a description of instructional strategies; suggestions for textbooks and supplementary materials; and the assessments needed to measure progress toward learning the content. Many curricula, in addition, provide "scope and sequence," a hierarchy of skills to be learned in a given order and a description of what to teach, when, and how. The absence of a formal curriculum makes it difficult to evaluate student progress, since learning goals are not specified. This in turn makes it difficult for the district to know which practices are working and make changes based on evaluation results.

State law requires that G/T students be served in the four academic areas of science, mathematics, language arts, and social studies. To serve G/T students in an academic subject, such as mathematics, a district would

develop an identification process that would identify students who are gifted in mathematics, develop a gifted mathematics program, curricula, and evaluation procedures, and provide all mathematics instruction to G/T students in a class. Currently, the district does not serve its G/T students in an academic subject.

Recommendation 19:

Develop a strategic plan to serve SISD's G/T students.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The assistant superintendent of Strategic Planning forms a team to develop a plan for G/T.	April 1998
2	The team researches gifted education, familiarizes itself with state rules and regulations governing gifted education, and develops a strategic plan.	May - September 1998
3	The team presents the plan to the SISD Board.	October 1998
4	The district implements the plan.	November 1998
5	The program evaluation specialist evaluates the effectiveness of the new G/T program and recommends changes.	January of each year

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

Chapter 2

ALTERNATIVE EDUCATION

CURRENT SITUATION

SISD provides alternative education programs in settings other than regular classrooms. The purpose of these programs, as described in SISD's Student Code of Conduct, is to provide a disciplinary alternative to suspension or expulsion. The student receives a supervised education as a part of the disciplinary action. The decision to place a student in alternative education is based on a review of his or her records and a meeting with the parents or guardian to discuss these records. Alternative education is focused on English language arts, mathematics, science, history, and self-discipline. SISD provides two alternative education settings: its Special Assignment Class (SAC) and KEYS Academy.

SAC is a designated room in each school supervised by a teacher, administrator, or other designated staff member. In this setting, the student receives assignments and instruction with few or no opportunities for social interaction with other students. This is intended to deter student misbehavior, reduce incidences of school disruption, and provide students with the best education opportunities possible. Students are instructed in the essential elements of the courses in which they are enrolled at the time of removal.

KEYS Academy, established in the 1994-95 school year, is SISD's separate alternative education school, serving student in grades 6 through 12. Prior to 1994-95, SISD operated an alternative school at Socorro High School. The school is located in the district's Education Annex with several other programs, including Community Education, Special Education, Project REAL, and the Health Clinic, among others. KEYS Academy occupies about half of the available space.

Enrollment in KEYS (the number of admissions to KEYS during the school year) has risen from 237 in 1994-95 to 367 in 1996-97, while average daily attendance has remained steady at about 87 students (**Exhibit 2-52**).

Exhibit 2-52

Enrollment and Average Daily Attendance

KEYS Academy

1994-95 - 1996-97

Program	1994-95	1995-96	1996-97
Enrollment *	237	220	367
Average Daily Attendance	87.43%	86.55%	87.37%

* Indicates number of students served by the school during the year.
Source: KEYS Academy, SISD

KEYS served a total of 367 admissions of 211 individual students in 1996-97. This means that of the 211 individuals, some returned to the program once or more than once during the year. The average daily attendance in the program was 87.37 students in 1996-97, which means that some what less than 90 students were in attendance at any given time. The KEYS Academy's actual cost for 1996-97 was \$1,389,431; based on an average daily attendance of 87.37 in 1996-97, the cost per student was \$15,903.

Dropout rates for the district have decreased from 1.5 percent in 1993-94 to 0.8 percent in 1996-97 (**Exhibit 2-53**).

Exhibit 2-53

SISD Dropout Rates

1993-94 - 1996-97

Description	1993-94	1994-95	1995-96	1996-97
Drop Out Rate	1.5%	1.2%	0.6%	0.8%

Source: PEIMS

SISD also participates in the regional Juvenile Justice Alternative Education Program (JJAEP). On November 13, 1997, Ysleta ISD's Board of Trustees approved an interlocal agreement with five other school districts to manage the regional JJAEP; these include Socorro, San Elizario, Fabens, Clint, and Tornillo ISDs. Ysleta operates three alternative education schools: Cesar Chavez Academy, Parkview Middle School, and the Tejas School of Choice. The interlocal agreement has allocated to JJAEP 25 slots in Cesar Chavez Academy, 25 more in Parkview Alternative Middle School, and additional slots in the Tejas School of Choice. JJAEP, in turn, has allocated SISD 12 slots at Cesar Chavez Academy.

FINDING

KEYS Academy is housed in a shared facility with Community Education, Special Education, the Clinic, Title 1 Migrant Office, Section 504/Counselor, and Project REAL, exposing 40 employees to the district's most volatile students. KEYS Academy does not have any physical barriers, such as fencing or security entrances/exits, to control access to the school, allowing students and others, such as gang members, to enter and leave at will. While the review team found no violent incidences between Keys Academy students and other occupants of the facilities, there were numerous incidents noted among KEYS students. In this one facility, there are elementary age children in close proximity to known gang members, students with violent tendencies, and students with identified drug problems.

Recommendation 20:

Construct physical barriers to separate students attending KEYS Academy from administrative offices.

The district should construct a chain-link perimeter fence around the Education Annex and install controlled-access vehicle-entry doors to the Education Annex and controlled-access doors to KEYS Academy. Other security measures also should be investigated and implemented.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The director of Support Services designs appropriate physical barriers separating KEYS Academy from administrative offices.	June 1998
2	The district constructs appropriate physical barriers at KEYS Academy.	August 1998

FISCAL IMPACT

The cost of constructing physical barriers is estimated at about \$1,600 (400 feet at \$4 per foot) for a chain-link fence and fence posts. Controlled access vehicle entry to the Education Annex and controlled access doors to KEYS Academy should cost about \$2,000.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Construct physical barriers at KEYS Academy.	(\$3,600)	\$0	\$0	\$0	\$0

FINDING

Passing rates for students at KEYS Academy are significantly lower than in the overall district and at Ysleta's Cesar Chavez Academy. Students at KEYS Academy take the TAAS either at the academy or at their home school before or after attending KEYS Academy. Out of a sample of 100 students, the review team found that 16 students were exempt from the 1996-97 TAAS (**Exhibit 2-54**).

Exhibit 2-54

Sample of KEYS Academy Students Taking the TAAS*

1996-97 School Year

	School of Examination	
Category	Home School	KEYS Academy
Exempt	12	4
Taking TAAS		
Reading	38	23
Mathematics	37	28
Writing	24	20
Total Taking TAAS	47	37

* From a sample of 100 students out of a total of 211 students served.
Source: KEYS Academy, SISD

Some special education students are exempt from the TAAS based on a review by their ARD Committee's decisions. This exemption is specified in the special education student's Individual Educational Plan. Bilingual and ESL students are exempt for three years from the date of their enrollment.

In 1996-97, overall TAAS passing rates at SISD were above 75 percent on all three components of the test (reading, writing, and mathematics), while passing rates for TSPR's sample of students at KEYS Academy were 57 percent or below on all three components (**Exhibit 2-55**).

Exhibit 2-55

TAAS Passing Rates at KEYS Academy *

1996-97 School Year

Category	KEYS Academy	District Average	Cesar Chavez Academy
Reading	57.3%	81.2%	71.0
Writing	54.5%	84.1%	77.4
Mathematics	46.2%	75.1%	44.1

*From a sample of 100 students out of a total of 211 students served.
Source: KEYS Academy, SISD

Passing rates for students taking the reading and writing components of TAAS also were significantly lower than rates at Cesar Chavez Academy in Ysleta.

TSPR found that the KEYS Academy curriculum is less academically and technically demanding than the mainstream district curriculum, and provides more opportunities for field trips and other enjoyable activities not available in regular classes-which tends to diminish the "deterrent" effect of KEYS Academy.

Some bus stops for students attending KEYS Academy are located at other schools (**Exhibit 2-56**), where KEYS students have been known to use drugs and to break district policy prohibiting their presence in other district schools.

Exhibit 2-56

Regular Bus Route 503

To KEYS Academy

Stop	Location
1	Montwood High School
2	Vista del Sol Elementary School and Winslow Homer
3	Double Jay and Swaps
4	Arrive at KEYS Academy

Source: Transportation Department, SISD

Bus routes for KEYS Academy also go through rival gang territories
(Exhibit 2-57).

Exhibit 2-57

Regular Bus Route 504

To KEYS Academy

Stop	Location	Name of Gang Claiming Territory
1	Buford and El Cid	Barrio Nuevo
2	Passmore and Datsun	Barrio Campestre
3	Dingdinger and North Loop	Barrio Campestre
4	Dingdinger and Walcott	Barrio Campestre
5	Zebu and Barzon	Barrio Campestre
6	Moon Rd. (by Trailer Court)	Moon City Locos
7	Moon Rd. and Armstrong	Moon City Locos
8	Moon Rd. and India	Moon City Locos
9	Nooch and Middle Drain	unclaimed territory
10	Bauman and Delano	unclaimed territory
11	Bauman and Rankin	unclaimed territory
12	Welletka and Valle Florido	unclaimed territory
13	North Loop and Sudan	The Cholo Posse, Lower Valley Kings, and Soco Locos
14	Horizon and Robin	unclaimed territory
15	Callander and Seminole	unclaimed territory
16	Callender and Moctezuma	unclaimed territory
17	Darrington and Roslyn	Black Outlaw Gang and Out of Action Krew
18	Bowdoin and Notre Dame	Black Outlaw Gang and Out of Action Krew
19	Peyton and Mark Twain	Black Outlaw Gang and Out of Action Krew
20	Peyton and Buckwell	Black Outlaw Gang and Out of Action Krew

21	Arrive at KEYS Academy	Barrio Campestre
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Source: Transportation Department, SISD and Project REAL

To ensure the safety and security of staff and students, the district places a driver, a monitor, and security guard on some "at-risk" bus routes. In one instance reported to TSPR, gang members attacked a security guard on a bus from KEYS Academy. The assistance of local law enforcement agencies is requested when KEYS security members or staff find students in possession of controlled substances or feel that that a search of a student's person is justified in accordance with school district policy.

Criminal activity and incident statistics appear to be rising at KEYS (**Exhibit 2-58**). However, the rise in criminal activity and incident statistics may partially attributable to changes in reporting requirements.

Exhibit 2-58

Criminal Activity and Incident Statistics

Education Annex

Description	1994-95	1995-96	1996-97	1997-98
Criminal activity	19	18	22	10 *
Incidents	31	26	30	5**

*As of September 8, 1997. ** As of September 2, 1997.

Source: Department of Security Services, SISD

Based on the review team's site visits to KEYS Academy and Cesar Chavez Academy, discipline appeared to be better at Cesar Chavez. Most students attend Cesar Chavez due to their parent's wishes. By contrast, students attend KEYS Academy as a result of their expulsion from other district schools. Nonetheless, many practices at Cesar Chavez Academy could and should be replicated at KEYS. These include the assignment of maintenance and janitorial chores to students, limits on bus privileges, and the requirement that students politely greet all visitors to the academy. Since the review team's site visit, KEYS Academy has implemented a special assignment class where discipline is firmly enforced and a school uniform policy. Students expelled from KEYS Academy are placed at the Cesar Chavez JJAEP.

Houston Independent School District (HISD) began participating in a privatized alternative school concept with Harris County in August 1997 and has seen the number of violent crimes in district schools drop by 23 percent. The Houston School for Accelerated Learning, located in a renovated Wal-Mart, teaches about 400 HISD students and is operated by Community Education Partners. It assigns three teachers to each class of 24 students and guarantees that every student will advance two grade levels in reading and math for every grade level that they are behind. It is estimated that the cost is \$9,300 per year per student in average daily attendance in the program. This cost includes the costs for personnel, curriculum, facilities including maintenance and custodial, food, and other general administrative expenses. Community Education Partners told the review team that serving a smaller district, such as SISD, would be more expensive simply because of the overhead involved in setting up the program remains the same but is supplied to a fewer number of students.

As noted earlier, KEYS Academy's actual cost for 1996-97 was \$1,389,431; based on an average daily attendance of 87.37 in 1996-97, the cost per student was \$15,903, an amount that significantly exceeds the amount being charged to HISD for these services.

Recommendation 21:

Upgrade the alternative program to better meet the needs of students in that program.

The district should carefully weigh the cost and benefits of upgrading the current alternative education program, or consider contracting for an alternative education program similar to the HISD model.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent of Administration and the director of Support Services evaluate HISD's private alternative school concept and consider its applicability to SISD.	June 1998
2	The assistant superintendent of Administration evaluated the current alternative education program and determines the costs and benefits of upgrading the current program.	October 1998
3	The assistant superintendent of Administration documents his findings and presents them to the superintendent and the board.	November 1998
4	The superintendent and board consider contracting the operation of KEYS Academy to a private alternative education company or upgrading the current program.	December 1998

FISCAL IMPACT

The district's cost per student for 1996-97 was estimated at \$15,903. TSPR assumes that it will cost the district another \$200,000 annually in staff and curriculum if the district decides to upgrade the current program. To expand the facility to serve a larger number of students could be accomplished if other programs currently sharing the facility were moved.

On the other hand, should the district decide to go with a contract service, the operating cost of an alternative education program run by a private company is estimated at \$10,000 per student in average daily attendance (higher than for HISD since this is a smaller district). For 90 students this would equate to an annual cost of \$900,000. If the district stays within its current \$1.4 million budget, in theory, the district could expand the program to service as many as 140 students at any given time.

Chapter 3

COMMUNITY INVOLVEMENT

This chapter reviews SISD's community involvement policies and programs in four sections:

- A. Mission and Organization
- B. District Communications
- C. Community Outreach and Involvement
- D. Parent Involvement

In evaluating SISD's community involvement efforts, the review team first identified five factors critical to a successful program. These include a high level of parent participation; a high level of participation from area businesses; a system for soliciting and managing monetary and in-kind contributions from the community; effective promotion of a positive community image; and efficient community involvement operations.

Overall, TSPR believes that SISD has a very good community involvement program. Survey results and group and individual interviews revealed that SISD maintains a positive image in the community. Interviews with SISD personnel showed that the district takes its role as a community center seriously, providing educational and recreational opportunities that benefit students, parents, and the general public. However, consolidation of the district's community involvement function into one department could improve the effectiveness of areas such as media communication and interaction with businesses.

During this study, the review team solicited input from the SISD community in three primary ways. First, surveys were distributed to parents, students, teachers, school administrators, and district office administrators. These surveys included questions on all areas included in this review. The complete survey results are included as Appendices A, B, C, D, and E. Second, two public forums were held at the beginning of the review at two schools in SISD. All community members were invited to attend these forums to provide input to this study. Finally, the review team conducted four focus groups—one for parents, one for members of the business community, one for teachers, and one for principals. These focus groups were facilitated by a member of the review team to solicit further

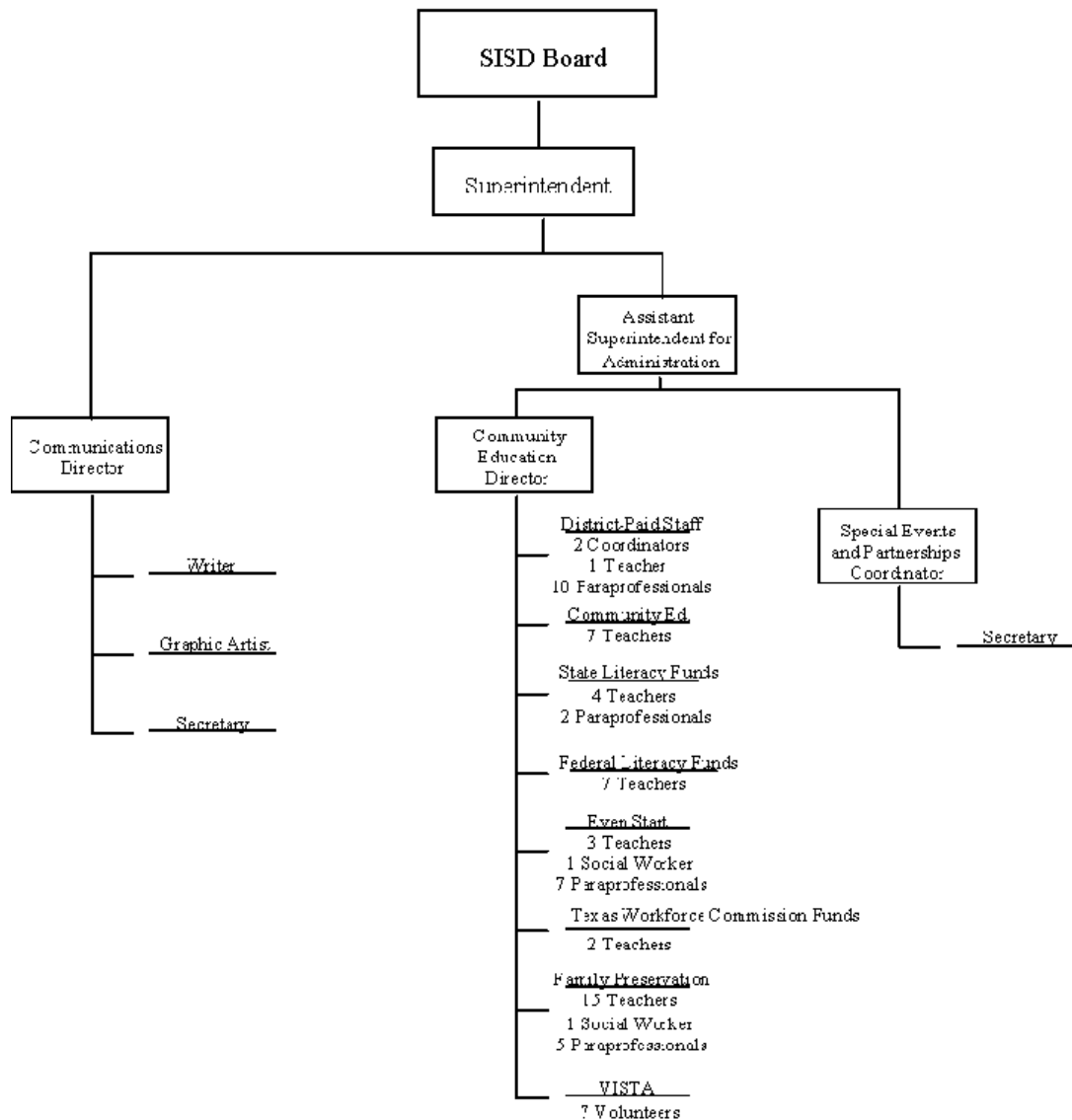
input. A summary of the comments received during the public forums and the focus group are included as Appendix F.

Background

Three departments-the Communications Department, the Community Education Department, and the Office of Special Events and Partnerships-manage SISD's community involvement functions. Exhibit 3-1 is a functional organization chart of SISD's community involvement effort.

Exhibit 3-1

SISD Community Involvement Organization



Source: SISD Community Education Department, Office of Special Events and Partnerships, and Communications Department

A total of 81 individuals work in the three departments that manage the community involvement function. Of these, 20 are paid with district funds; the remainder are paid through various grant sources, including Even Start, Family Preservation Funds, federal and state literacy funds, the federal VISTA volunteer program, Communities in Schools funding, and federal Title I grants.

SISD's total 1996-97 budget from its general fund for community involvement was \$718,082. Exhibit 3-2 displays a breakdown of this budget by department and expenditure category.

Exhibit 3-2

Community Involvement Budget (General Fund)

1996-97 School year

Category	Amount
Partners in Education / Special Events	
Payroll	\$66,778
Contracted Services	\$4,500
Supplies and Materials	\$19,050
Other Operating Expenses	\$15,750
Total	\$106,078
Community Education	
Payroll	\$328,619
Contracted Services	\$20,038
Supplies and Materials	\$28,505
Other Operating Expenses	\$29,319
Total	\$406,481
Public Relations	
Payroll	\$111,873
Contracted Services	\$15,100

Supplies and Materials	\$51,350
Other Operating Expenses	\$27,200
Total	\$205,523
Total, Community Involvement	
Payroll	\$507,270
Contracted Services	\$39,638
Supplies and Materials	\$98,905
Other Operating Expenses	\$72,269
Grand Total	\$718,082

Source: SISD Proposed Budget, 1997-98

As noted above, grant funds provide substantial revenues for community involvement functions, and for 1997-98 total more than \$485,000 (Exhibit 3-3).

Exhibit 3-3

SISD Grant Funds Relating to Community Involvement

1997-98 School Year

Grant Source	Funding
Adult Education Funds	\$79,809
Even Start Family Literacy	\$239,250
Family Preservation	\$133,004
Title I*	\$33,707
Total Grants Received	\$485,770

* Dream Machine budget only. Source: SISD Community Education Department and Title I Coordinator

Over the past five years, SISD's budget for community involvement activities has risen by 142 percent (Exhibit 3-4). By far the largest increase came in payroll costs.

Exhibit 3-4

Community Involvement Budget

1993-94 through 1997-98

	1993-94	1994-95	1995-96	1996-97	1997-98	% Change
Payroll Costs	\$164,643	\$296,879	\$275,592	\$507,270	\$530,738	222%
Contracted Services	\$39,500	\$39,300	\$39,638	\$39,638	\$32,300	-18%
Supplies and Materials	\$63,000	\$46,400	\$65,650	\$98,905	\$77,650	23%
Other Operating Expenses	\$15,766	\$22,103	\$23,200	\$72,269	\$45,300	187%
Capital Outlay			\$6,400			
Total	\$282,909	\$404,682	\$410,480	\$718,082	\$685,988	142%

Source: SISD Budgets, 1993-94 through 1997-98

Chapter 3

Mission and Organization

Chapter Contents:

- A. Mission and Organization
- B. District Communications
- C. Community Outreach and Involvement
- D. Parent Involvement

CURRENT SITUATION

SISD's Communications Department manages district media relations, including press releases; internal and external district newsletters; the district's standing advisory groups; and graphic design services for all district departments and schools. The department's staff includes a director, a writer, a graphic design artist, and a secretary.

The Community Education Department coordinates parental and volunteer involvement in the district; oversees the district's Even Start program, which provides adult educational services for indigent parents; manages Even Start and other state and federal grant funds, including family preservation and adult literacy grants; coordinates the VISTA volunteer program; and provides community education and training. This office has 36 full-time administrators, case workers, volunteers, and paraprofessionals, and 39 full- and part-time teachers.

The Office of Special Events and Partnerships plans special events; coordinates the district's Partners in Education program, which solicits business involvement; and markets district facilities and events. This office plans concerts, festivals, and sporting events held at the district's Student Activity Center and seeks opportunities for district involvement in community events such as a recent National Basketball Association exhibition game. This office also helps to attract events to the newly constructed Aquatics Center. In addition, Special Events and Partnerships sells advertising for the district's school bus advertising program.

The federal Title I grant coordinator also has a significant impact on district community relations through the Dream Machine, a bus that serves as a mobile classroom (the Dream Machine is discussed in detail later in this chapter).

In addition to grant funds, SISD schools hold parental fund-raising events and seek monetary and in-kind contributions from community members. Exhibit 3-5 shows the amount of monetary and in-kind donations raised by such fundraising efforts in 1996-97.

Exhibit 3-5

Monetary and In-Kind Contributions

1996-97 School Year

	Monetary	In-Kind	Total
Districtwide	-	\$11,086	\$11,086
<i>High Schools</i>			
Americas HS	\$3,799	-	\$3,799
Montwood HS	\$19,706	\$600	\$20,306
Socorro HS	\$2,762	\$92	\$2,854
<i>Middle Schools</i>			
Clarke MS	\$5,798	\$200	\$5,998
Montwood MS	\$1,300	\$165	\$1,465
Sanchez MS	-	\$883	\$883
Slider MS	-	\$5,594	\$5,594
<i>Elementary Schools</i>			
Benito Martinez	\$2,000	\$230	\$2,230
Chavez	\$1,000	\$300	\$1,300
Escontrias	-	\$1,070	\$1,070
Escontrias ECC	\$10,548	\$940	\$11,488
H.D. Hilley	-	\$657	\$657
Helen Ball	\$35	\$550	\$585
Horizon Heights	\$1,222	-	\$1,222
Hueco	\$1,830	-	\$1,830
Myrtle Cooper	\$125	\$3,000	\$3,125
O'Shea Kelleher	\$2,300	-	\$2,300
Rojas	\$1,500	-	\$1,500

Sierra Vista	-	\$100	\$100
Vista Del Sol	\$1,150	\$1,450	\$2,600
Totals	\$55,075	\$15,831	\$70,906

No figures are available for Socorro Middle School or Campestre Elementary School. Source: SISD Finance Department

Of the \$70,906 in monetary and in-kind contributions in 1996-97, \$13,056 came from parent-teacher associations and parent-teacher organizations (PTAs/PTOs).

FINDING

SISD teachers and administrators, gave the district's community involvement efforts generally high marks in a TSPR survey (Exhibit 3-6).

Exhibit 3-6

SISD Survey Results - Community Involvement

Teachers and Principals

	Strongly Agree / Agree	Disagree / Strongly Disagree	Neutral / No Response / No Opinion
My school encourages parents to be involved.	94.5%	1.9%	3.7%
My school encourages community members to be involved.	93.2%	2.5%	4.3%
The community is more involved in SISD than it was five years ago.	58%	4.9%	37%

Source: TSPR Survey of SISD Teachers and Principals

District office staff were even more positive: 73.5 percent felt that the community is more involved with SISD than it was five years ago. Survey and focus group input indicate similarly positive perceptions on the parts of parents and students.

COMMENDATION

SISD has a good reputation among its teachers, administrators, and staff for parental and community involvement.

FINDING

Grant funds, as already noted, provide a significant amount of SISD's revenues for community involvement functions and serve a variety of needs.

Even Start funds provide adult educational services for indigent parents with children ages eight or younger.

Adult education funds provide classes in literacy, basic and secondary education, English as a Second Language (ESL), citizenship, and life-coping skills for out-of-school youths and adults who function at less than a secondary school completion level.

Family Preservation funds provided through the Texas Department of Protective and Regulatory Services support programs that strengthen families and prevent child abuse.

Title I funds, provided by the federal Elementary and Secondary Education Act, are used to improve the education of children at risk of failing who reside in areas with high concentrations of low-income families.

Exhibit 3-7 displays the outcomes of each grant.

Exhibit 3-7

Grant Funds and Results

Grant and Source	Results
Even Start, Texas Education Agency	121 families enrolled 55 hours of classes provided per week 55 hours of child care provided per week
Adult Education Funds, Texas Education Agency and U.S. Department of Education	20 classes provided 626 individuals served
Family Preservation Funds, Texas Department of Protective and Regulatory Services	2,223 hours of ESL, GED, and community education classes provided per year 200 individuals served in food service and CPR classes 1,608 hours of child care provided

	3,900 participants in field trips 41 participants in special (overnight) trips 3,909 individuals registered
Title I, U.S. Department of Education	Dream Machine: 325 individuals served (7/1/97 to 10/3/97); Total book circulation: 1,882 (1/97 through 9/97) 5 community education parent-child trainers partially paid through Title I funds

Source: SISD Community Education Program

The Community Education Department has made a concerted effort to maximize its funding in each grant and, where possible, to run programs collaboratively and join their resources. Exhibit 3-8 illustrates how such resources can be combined.

Exhibit 3-8

Adult Basic Classes Offered and Funding Sources

1997-98 School Year

Class	Teacher Funding Source	Days Offered	Times Offered
English as a Second Language (ESL) 1	Family Preservation funds; Federal and state literacy funds	M/W	9:30-11:30 am 6-8 pm
		T/Th	8:30-10:30 am 6-8 pm
ESL 2	Family Preservation funds; Federal and state literacy funds	M/W	6-8 pm
		T/Th	6-8 pm
ESL 3	Family Preservation funds	M/W	6-8 pm
ESL for Citizenship	Family Preservation funds;	M/W	6-8 pm

	Federal and state literacy funds		
		M/W/F	8:15 am-12:15 pm
ESL / Even Start	Federal literacy funds	T/Th	8:30 am-1:30 pm
ESL / Family Literacy	Even Start	M-F	8 am - 3 pm
ESL for Spanish GED	Federal literacy funds	M-Th	3-4 pm
ESL 1 / TWC	Texas Workforce Commission (TWC)	M-F	8:15 am-12:15 pm
ESL 2 / TWC	TWC	M-F	1-4 pm
ESL 3 / TWC	TWC	M-F	8-11 am
Pre-GED / GED/ TWC	TWC	M-F	1-4 pm
English GED	Federal literacy funds	T/Th	8:15 am-12:15 pm
Spanish GED	Federal literacy funds	M-Th	1-3 pm
Spanish GED	Family preservation funds	T/Th	3:30-5 pm
NovaNET / Internet	District funds	M-F	11 am - 8 pm

Source: SISD Community Education

COMMENDATION

The Community Education Department has maximized the funding it receives through a variety of grants by combining resources where feasible and encouraging collaboration between grant-funded programs.

FINDING

SISD's three community involvement departments maintain separate staff support. SISD's payroll costs for the three departments were \$507,270 in 1996-97.

Non-payroll costs from the district's general fund totaled \$210,812 in 1996-97. These costs include utilities, contracted services, and general office supplies paid.

Functions are duplicated between the three departments and other SISD departments and schools, resulting in duplicated effort, inadequate controls over information disseminated to the community, and a lack of communication between departments. Exhibit 3-9 lists the traditional functions of district community involvement and the department or departments responsible for each function.

Exhibit 3-9

Community Involvement Functions by Department

Function	Responsible Department
Communication with the community/newsletters	Communications, Special Events and Partnerships, individual schools
Media relations	Communications, Special Events and Partnerships, individual schools
Partners in Education	Special Events and Partnerships, individual schools
Community input mechanisms	Communications, individual schools
Community education	Community Education, Title I
Government relations	Office of the Superintendent
Parent involvement/volunteer coordination	Community Education, individual schools

Source: Interviews with director of Communications, director of Community Education, and Special Events and Partnerships coordinator, SISD

These functions are shared among two directors and one coordinator, resulting in unclear job boundaries and inefficient communications. In addition, community members may not know the appropriate contact in some cases, or may receive conflicting information from different sources. The district's relationship with area businesses provides an example. While the Office of Special Events and Partnerships handles Partners in Education, the Communications Department coordinates the Business Advisory Group, another outreach program targeting local businesses. While most business representatives interviewed were satisfied with their relationships with the district, an executive with one area business expressed frustration over conflicting information he has received from the schools and central administration.

Media relations provide another example of overlapping responsibilities and conflicting approaches. The director of Communications characterizes SISD's approach to media relations as "proactive" and "open," particularly with respect to emergencies or crises. However, some teachers in focus group meetings and one-on-one interviews reported that, in the past, some schools have sometimes failed to report all emergency situations or other problems to the media.

Recommendation 22:

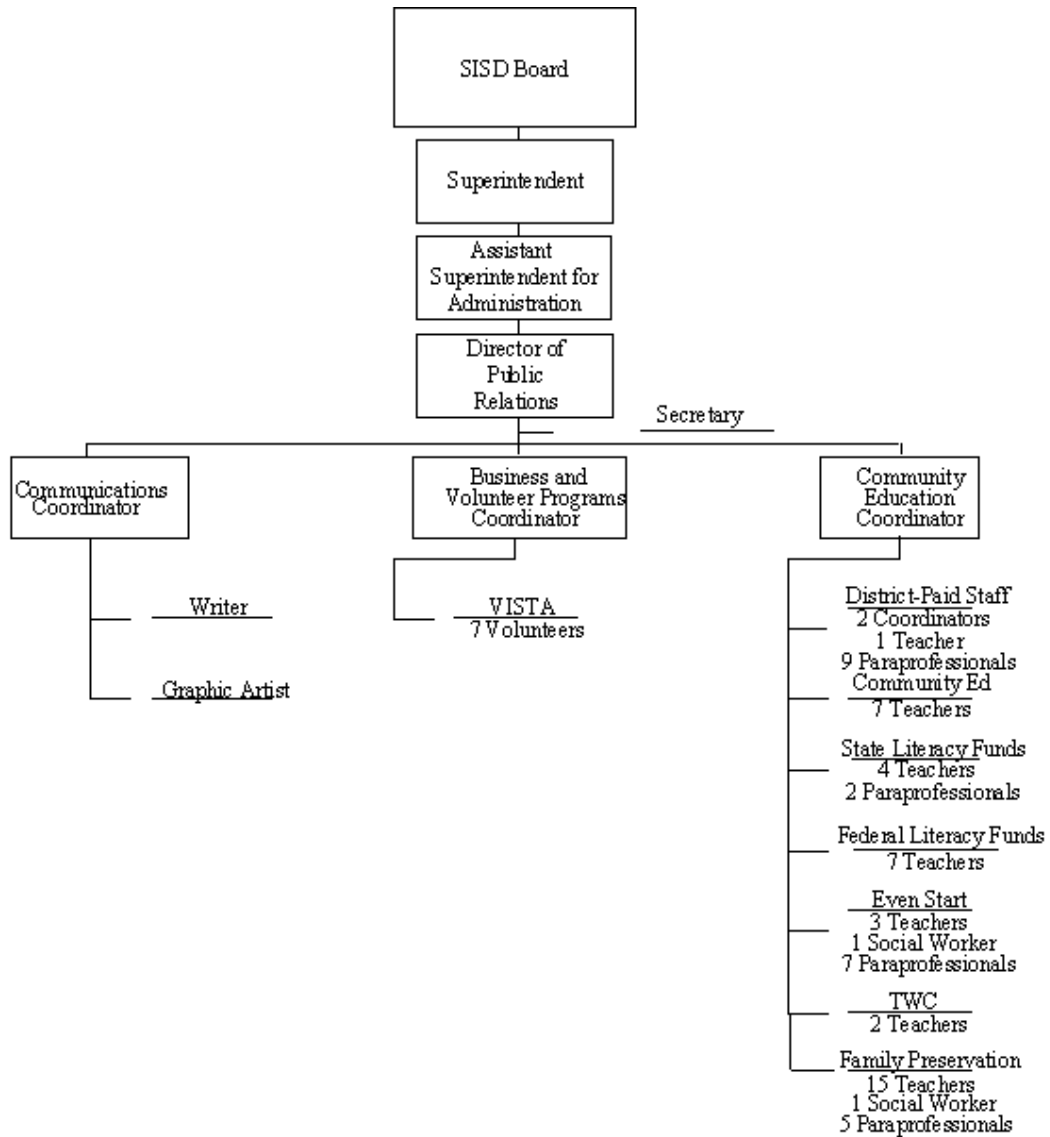
Combine the Communications, Special Events and Partnerships, and Community Education departments into a single department with one director and three coordinators.

The new department should be called the Public Relations Department and include coordinators for communication, community education, and business and volunteer programs. Exhibit 3-10 provides a recommended organizational structure for the new department.

Exhibit 3-10

Recommended Organization

Public Relations Department



Source: Neal & Gibson

Exhibit 3-11 outlines the responsibilities of the director and each of the coordinators of the recommended department.

Exhibit 3-11

Responsibilities of Key Personnel

Public Relations Department

Position	Function
Director of Public Relations	Primary spokesperson for the district

	Oversee department Market district facilities for community events Special projects Government relations/relations with other districts
Communications Coordinator	Issue press releases Write/edit district newsletters Media contact point Coordinate open records requests
Business and Volunteer Program Coordinator	Coordinate Partners in Education program Direct community input mechanisms (advisory groups) Coordinate parent involvement and volunteers Oversee school bus advertising program
Community Education Coordinator	Direct community education programs Oversee community use of computer labs and other educational resources Administer community education grants

Source: Neal & Gibson

This reorganization would result in the elimination of two paraprofessional positions, the reclassification of one director as a coordinator, and a more streamlined organizational structure. In addition, overhead expenses would be shared and communications among the coordinators would improve.

Grants currently received by the Community Education Department would not be affected, since no grant-funded positions are being changed or eliminated and all grant-funded positions would remain under the supervision of the coordinator of Community Education.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The superintendent reorganizes the three existing departments into the Public Relations Department.	July 1998
2	The assistant superintendent for Human Resources reclassifies positions in the newly formed Public Relations Department to ensure that placements in the salary schedule are appropriate with revised job duties.	July 1998
3	The assistant superintendent for Human Resources and director of Public Relations eliminate two paraprofessional positions.	July 1998

FISCAL IMPACT

Reclassifying one director as a coordinator and eliminating two secretarial positions would save the district an estimated \$44,463 each year in the first two years and \$62,502 annually thereafter in salaries and benefits.

These calculations assume that the salaries of the incumbents would not change; savings would result only after the incumbent has left the position. The review team estimated that the district would be able to move the incumbent to another position within three years. The estimate also assumes that the reclassified Communications coordinator would be in the same pay group as the Title I coordinator (Professional 5), and that the new director of Public Relations would receive the same salary as the higher salary of the two incumbent directors. Finally, the secretary of the Public Relations Department would receive the same salary as the highest salary paid to secretaries in the three existing departments.

Overhead costs might be reduced through sharing of space and office supplies; however, a specific savings figure cannot be estimated at this time.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Combine Communications, Special Events and Partnerships, and Community Education departments	\$44,463	\$44,463	\$62,502	\$62,502	\$62,502

FINDING

The tracking process for grant funds in the Community Education Department is excessively labor-intensive, since it involves the use of two separate computer programs. Exhibit 3-12 outlines the grant tracking process.

Exhibit 3-12

Grant Tracking Process

Step	Action
1	A grant is awarded to SISD's Community Education Department.
2	The director of Community Education works with the Finance Department to set up an account for grant funds.

3	Initial grant information is entered into Quicken by a clerk or grant manager in the Community Education Department.
4	Community education services begin as proposed.
5	Funds expended are entered into Quicken by the clerk or grant manager.
6	Payroll and purchase orders are entered into Pentamation so that the Finance Department can track expenditures and issue warrants.
7	Amounts entered into Pentamation are checked against Quicken balances.
8	At end of reporting cycle, a report is run from Quicken in order to submit a request for reimbursement to the granting agency using the agency's reimbursement forms.

Source: Interview with director of Community Education, SISD

Grant funds are tracked by the individual grant managers through Quicken, a financial accounting computer program, and the district's Pentamation system. The director of Community Education says that this is done because Pentamation alone cannot manage the district's various grants. In reality, however, it appears that users simply do not know how to run queries and reports in Pentamation, but have learned to do so in Quicken.

The district is currently preparing a request for proposals (RFP) for a system to replace Pentamation.

Recommendation 23:

Include user training in query and report generation in the specifications for the new districtwide financial software.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The Strategic Planning Department includes user training in the RFP to be issued for a replacement for Pentamation.	April 1998
2	The director of Public Relations, with the Strategic Planning Department, ensures that all grant managers receive training on the new system.	August 1999
3	The grant managers discontinue the practice of entering information into Quicken.	August 1999

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

Chapter 3

DISTRICT COMMUNICATIONS

CURRENT SITUATION

The district produces two newsletters, the *Spotlight* and *SISD Update*. The *Spotlight* is sent to all SISD parents and other community stakeholders. It includes pictures and feature stories about schools and students and highlights awards earned by the district and its students.

SISD Update is targeted to SISD employees and provides information about employee milestones (retirements, length of service, marriages, etc.), changes in district policy, TAAS test dates, and other general-interest articles (Exhibit 3-13).

Exhibit 3-13

District Publications

1996-97 School Year

Publication	Description	Target Audience	Frequency	Cost per Publication*	Annual Cost	Distribution Method
<i>Spotlight</i>	Public newsletter	Parents Businesses Employees	Every other month	24 cents a copy	\$25,020	District mail U.S. mail
<i>SISD Update</i>	District newsletter	Employees	Monthly	4 cents a copy	\$1,472	District mail

* Includes printing, postage, and English-Spanish translation, if applicable. Source: SISD Communications Department

The Communications Department also provides graphic design services to the rest of the district. The services of the in-house graphic designer are available to all departments and schools at no cost to the requesting school or department. Graphics jobs are requested through a requisition form; the graphic designer estimates the number of hours the job will take and the Print Shop estimates the cost for printing and the materials.

The director of Communications manages district media relations and regularly issues media releases to five local television stations and two area newspapers. While schools and other departments may deal directly with the media, all district employees who are contacted by or who contact the media are asked to inform the director of Communications as soon as possible. Controversial issues, such as personnel issues or emergency situations, are handled by the director of Communications.

FINDING

Spotlight is a bimonthly publication produced in English and Spanish. It is mailed to all parents and to other members of the community through the U.S. mail. Because Spanish is the primary language in many households in the district, translating the newsletter into Spanish helps ensure that it reaches its intended audience.

According to a TSPR survey, stakeholders feel that SISD does a good job of communicating with the community (Exhibit 3-14).

Exhibit 3-14

TSPR Survey Responses

SISD Communication Effectiveness

SISD communicates well with the community.	Strongly Agree / Agree	Disagree / Strongly Disagree	Neutral / No Opinion / No Response
SISD Staff	91.2%	-	8.8%
Teachers and Principals	88.9%	4.3%	6.8%
Parents	67.6%	16.2%	16.2%

Source: TSPR Survey results

Since it is one of the district's primary means of communicating with the community, these results indicate that *Spotlight* is working well.

COMMENDATION

The district mails a newsletter, printed in both Spanish and English, to all parents in the community and to other members of the SISD community six times a year.

FINDING

SISD recently entered into a partnership with El Paso and Ysleta ISDs to obtain time on a public access cable channel (Channel 14) for district programming. SISD has rights to three hours of programming each week; this programming must be instructional in nature. The district plans to have students at Socorro and Montwood high schools produce a 30-minute weekly show. With faculty guidance, students will be responsible for determining the show's content, developing scripts, and directing, producing, and performing in it. This program should raise SISD's profile in the community while providing students with substantive work experience.

COMMENDATION

The district has entered into a partnership with El Paso and Ysleta ISDs to produce programming on a public access cable television channel.

FINDING

While SISD makes regular use of television and the print media, it is less successful in using radio to reach the community. Television is generally considered by advertising professionals and public relations experts to be the most effective method of mass communication, followed by radio. Print media is the least effective method of communication.

According to a 1996 Arbitron study, 95.1 percent of the U.S. population ages 12 and up listens to radio at least once each week, and 76.5 percent listens every day (Source: Spring 1996 Arbitron National Database Cume PUR Estimates). Another Arbitron study performed in fall 1995 estimated that 96 percent of Hispanics ages 12 and older residing in the U.S. listen to the radio every week.

Expanding its use of radio would give the district a highly effective means of reaching the Spanish-speaking residents of El Paso County. While El Paso has two Spanish-language television stations, there are four Spanish-language radio stations in the El Paso/Ciudad Juarez area.

Radio and television public service announcements (PSAs) are free to the district. Talk radio offers many additional opportunities for SISD representatives to reach the community; appearances on talk radio programs also are free to the district. Furthermore, while the content of PSAs must be limited to information about specific events, individuals appearing on talk radio shows may discuss general district policies and initiatives and publicize awards and other news.

Recommendation 24:

Expand SISD's use of radio as a method of communicating with the community.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The director of Communications regularly develops radio public service announcements in both English and Spanish.	June 1998
2	The director of Communications works with radio personalities to gain appearances for members of the SISD community on talk radio shows and on other radio programs.	June 1998

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

Overall, community members appear to be pleased with the district's response to their concerns and input; however, some expressed concern that the district does not take public input into account, instead using advisory groups and public forums to "rubber stamp" decisions already made by district leaders. These opinions were expressed at the public forums, the parent focus group, and the business focus group.

Exhibit 3-15 summarizes the results of surveys of district staff, teachers, principals, and parents regarding the district's use of community input.

Exhibit 3-15

Opinions Regarding Community Input

		Strongly Agree / Agree	Disagree / Strongly Disagree	Neutral / No Opinion / No Response
The district solicits comments and suggestions [from the community].	District Staff	91.2%	0%	8.8%
	Teachers	77.2%	4.9%	17.9%

	and Principals			
	Parents	43.2%	13.5%	43.2%
The community provides comments and suggestions to the district.	District Staff	91.2%	0%	8.8%
	Teachers and Principals	71.6%	2.5%	26%
	Parents	32.4%	13.5%	54%
The district takes advantage of community comments and suggestions.	District Staff	79.4%	2.9%	17.6%
	Teachers and Principals	64.8%	4.3%	30.9%
	Parents	35.1%	16.2%	48.6%
The community is more involved in SISD than it was five years ago.	District Staff	73.5%	2.9%	23.5%
	Teachers and Principals	58%	4.9%	37%
	Parents	(Parents were not asked this question)		

Source: TSPR Survey results

In the same survey, parents were asked whether they felt encouraged to become involved in their children's school(s). Seventy-three percent of the parents who responded reported that they were encouraged to be involved; 13.5 percent said that they did not feel encouraged; and another 13.5 percent did not respond or were neutral on the subject.

Specific instances in which individuals said they felt that the district used advisory groups to rubber stamp decisions already made included the last bond election and the selection of a textbook for sexual education.

The construction of the district's Aquatics Center provides another example of an instance in which some community members feel the district "broke trust" with the community. SISD used \$3.9 million in operating funds to build the center. Because operating funds were used, the district was not required to seek voter approval before beginning construction. While the district was within its rights in deciding not to seek public input, the decision offended some community members that had supported the district on many other controversial issues.

Another concern was expressed by a member of the school board, who said that some residents feel that the district does not reach out to the community south of I-10. Community members, principals, and teachers from areas south of I-10 echoed this concern, saying that projects often are oriented toward communities on the north side of the interstate.

The location of the Aquatics Center was cited by some as an example of this pattern; these individuals stated that, while decision-makers used the lack of recreational opportunities area south of the interstate as a justification for constructing the Aquatics Center, the center was actually built north of the interstate, making it difficult for some Valley residents to attend.

Conversely, however, some district administrators expressed a concern that many more activities are oriented to residents on the south side of I-10 than to northside residents. They argue that the east side of the district is the area with the fewest number of recreational and community education opportunities.

While all of the above examples are only perceptions of individuals in the community, maintaining the trust and support of the community is critical in a district facing the challenges of rapid growth.

Recommendation 25:

Institute a system that ensures that all areas of the community have adequate opportunities to voice concerns and opinions about district activities and policies.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The board resolves to set up public forums to seek community input.	Ongoing
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2	The board directs the superintendent to set up public forums semi-annually on both sides of I-10 and the eastern side of the district to seek input from the community in all matters of public concern.	Ongoing
3	The superintendent and the board of trustees ensure that all members of the district have access to meetings by holding board meetings in various areas of the district, and providing transportation as needed.	Ongoing

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

Chapter 3

Community Outreach and Involvement

CURRENT SITUATION

SISD has a number of community outreach and involvement programs. In addition to hosting district sporting events, the Student Activity Center is available for many activities, including concerts and festivals that are open to the public. The district makes an effort to attract events that will appeal to a broad base of El Paso area residents, thereby contributing to community recreational opportunities while bringing additional revenues into the district.

District leaders hope the new Aquatics Center will serve as a community social center as well as a recreational facility in an area with few such amenities.

In addition to regular community education classes, SISD receives grants to provide classes for specific segments of the population. The family preservation grant from the Texas Department of Protective and Regulatory Services provides English as a Second Language (ESL) classes, parenting classes, counseling, and other activities. The Even Start grant provides parenting classes, ESL and General Equivalency Diploma (GED) classes, child care, and transportation to families with children up to eight years old who meet income requirements.

SISD has a grant from the VISTA volunteer program to develop a strong volunteer program in its schools. Seven full-time VISTA volunteers located at various schools and at the Community Education Center help organize parent and community volunteer activities in the district.

Finally, the district has established extensive partnership agreements with the YWCA. The Hueco Club camp, which is paid for through Family Preservation funds, allows students to attend day camp during intersession to swim and attend classes. Leadership training for parents and teens and after-school day care also are provided.

FINDING

A public health clinic, the Socorro Health Education Center, is located on the grounds of Escontrias Elementary School. This clinic is funded by a grant from the W.K. Kellogg Foundation and is a joint effort between the University of Texas at El Paso, Texas Tech University Health Science

Center, El Paso Community College, Thomason Labs, El Paso County, and the Kellogg Foundation. The clinic is open to the entire community. A registered nurse and a nurse-practitioner staff the clinic weekdays between 8 a.m. and 5 p.m. General practitioners, dentists, and specialists rotate through the clinic on a weekly or biweekly schedule. The facility includes a small laboratory; a courier transports lab specimens for more complicated tests to the main Thomason Labs facility each day. The services available are shown in Exhibit 3-16.

Exhibit 3-16

Socorro Health Education Center Services

Service	Provider/Partner
Pediatrics; family medicine; women's health; mammograms; family planning; vision, hearing, scoliosis, blood pressure, and diabetes screening; physical exams; immunizations; referral and case management of chronic illnesses	Texas Tech University Health Science Center
Dental services	El Paso Community College
Laboratory	Thomason Labs
Behavioral medicine	University of Texas - El Paso
Counseling (e.g., substance abuse, family, adolescent)	University of Texas - El Paso
Social work services	University of Texas - El Paso and University of Texas at Austin
Administration	Kellogg Foundation
Billing for clinic visits	Texas Tech University Health Science Center
Billing for lab work	Thomason Labs
Facility and utilities (except phone service)	SISD

Source: Socorro Health Education Center

From September 1995 to August 1996, the clinic served 4,822 individuals who made more than 19,000 visits. This is an average of 402 patients and 1,608 visits per month. Participation rates are increasing; in September 1997, 496 patients visited the clinic.

The district provides the facility and clinic services are billed directly to Medicare, Medicaid, private insurance, or the patient. However, no one is denied service because of an inability to pay. The billing clerk works out payment plans with patients who cannot pay the entire amount of the bill. Any shortfall or unpaid bills are paid by the Kellogg Foundation; therefore, the district is not held liable.

In a visit to the clinic, the review team found the facility to be clean, attractive, and spacious.

COMMENDATION

SISD provides the facilities and pays the utilities for a highly successful and well-used public health clinic located on the grounds of Escontrias Elementary School.

FINDING

The district has developed partnerships with a number of businesses. In 1995-96, SISD established partnerships with 148 businesses and organizations. In 1996-97, 157 more partnerships were established. Exhibit 3-17 provides examples of the partnerships developed.

Exhibit 3-17

Partners in Schools

Selected Partnerships, 1996-97

School/Department	Business/Organization	Activity
Americas High School	Norwest Banks	Norwest Banks and Americas High School work together to develop the curriculum for the Inter-American Magnet Program for Global Commerce and Trade
Helen Ball Elementary	Whataburger	Fund raisers, coupons, party discounts are provided by Whataburger; the school provides facilities for Whataburger activities. advertising in the

		school newspaper, artwork, and students for special performances
Guidance and Counseling Department	UTEP Mother-Daughter Program	Direct student services, group activities, and a professional women's network are provided by UTEP; SISD provides campus contact points, enrollment centers, transportation, printed materials, and a steering committee

Source: SISD Partners in Education

The district is careful to establish partnerships that will benefit both its schools and the businesses. The coordinator of Special Events and Partnerships, who oversees the Partners in Education program, told the review team that she discourages individual schools from establishing partnerships with more than one hamburger or pizza restaurant. In this way, SISD ensures that this program does not add to competitive pressures among businesses in the same industry.

SISD emphasizes in-kind rather than monetary donations, and encourages businesses to establish mentoring programs that allow students to learn about businesses and careers and to receive individual attention from positive community role models.

Ensuring that businesses feel they receive reciprocal benefits from schools is sometimes difficult. The coordinator of Special Events and Partnerships encourages business partners to select a community service activity once a year in which students can participate alongside the business' employees. This type of side-by-side activity boosts the image of both the businesses and SISD.

The Business Advisory Group is made up of community leaders from both the public and private sectors and meets regularly to allow members to learn about district initiatives and to advise the district. Many of the group's member businesses also are active in the Partners in Education program.

COMMENDATION

SISD schools have developed strong, mutually beneficial partnerships with a variety of businesses.

FINDING

Computer labs at some schools are open to the public when not being used for classes. Each school can decide whether to open its labs to the community; designated community labs are located at the Community Learning Center and Americas High School. In addition to allowing parents and community members to use the computers for standard office uses and education, the labs offer free e-mail accounts and Internet access to community members.

E-mail accounts are offered through Rio Grande FreeNet, a project established through El Paso Community College. Rio Grande FreeNet is a volunteer-based service that gives every member of the greater El Paso community with access to a computer and modem a text-based interface to the Internet. Rio Grande FreeNet is funded through grants from a variety of sources, including a large grant from AT&T. It was the first service of its kind in Texas and has been replicated in other areas of the state.

SISD plays an important role in ensuring that residents of the Socorro area have access to FreeNet. While El Paso public libraries have terminals that allow the public access to FreeNet, there are no public libraries within SISD's boundaries; the district offers the only locations in its area where the general public can connect to FreeNet.

In an area with a poverty level as high as SISD's, a personal computer at home is a luxury affordable to few. Therefore, SISD's computer labs provide a highly valuable service to the community.

Users of the SISD computer labs can also "surf" the World Wide Web using SISD's browser, Netscape, without charge.

Computer classes are also offered through Family Preservation funds. A schedule of classes offered is shown in Exhibit 3-18.

Exhibit 3-18

Community Computer Courses Offered

1997-98

Class	Location	Day and Time	Cost / Restrictions
Internet/e-mail/ NovaNET/open lab	Americas High School	M-Th, 3:30 - 8:00	None
Internet/e-mail/ NovaNET/open lab/	Community Learning Center	M-Th, 4:30 -	None

typing tests		8:00	
NovaNET for Displaced Workers	KEYS Computer Lab	M-Th, 4 - 5:30	By Texas Workforce Commission contract only
NovaNET for Displaced Workers	KEYS Computer Lab	M-F, 11 am - 1 pm	By Texas Workforce Commission contract only

Source: SISD Community Education

The labs at the Community Education Center and Americas High School are open for public use in the evenings, and are monitored by lab facilitators who can help users and troubleshoot problems. Other schools that invite community members to use their computer labs arrange for a person to be on duty when the lab is open. In most cases, the teacher in charge of the computer lab is either paid a stipend or volunteers time to monitor the lab after hours.

COMMENDATION

SISD offers parents and community members access to computers in some district computer labs and provides them with free Internet access and free e-mail accounts through FreeNet.

FINDING

The Dream Machine is a mobile classroom funded by federal Title I grants. The converted bus houses a library, two computer workstations, a television with VCR, a craft area, and a reading area. The Dream Machine travels throughout the district on a weekly schedule, making 1.5 to two-hour stops in school parking lots, in front of community centers, and in other parking areas in and near neighborhoods. Members of the community may check out books, use the computers, and participate in activities with their children.

The primary goal of the Dream Machine is to make young children comfortable with a classroom environment and ready to begin attending school. Visiting children must be accompanied by an older child or adult; children may work alone on projects or together with other children.

For adults, the Dream Machine provides information about upcoming ESL and GED classes and occasionally offers special classes in such topics as financial planning.

The total cost of operating the Dream Machine in 1997-98 is \$33,707, including payroll, vehicle supplies and maintenance, and general student supplies (Exhibit 3-19).

Exhibit 3-19

Dream Machine Budget

1997-98 School Year

Description	Amount
Payroll	\$29,707
Vehicle supplies	1,500
General student supplies	2,000
Vehicle maintenance and repair	500
Total	\$33,707

Source: SISD Title I coordinator

The Dream Machine schedule is shown in Exhibit 3-20.

Exhibit 3-20

Dream Machine Schedule

As of November 1997

Day	Time	Location
Monday	10:00 - 11:30 am	Welletka at North Loop
	12:30 - 2:00 pm	McAdoo at Leloins
	2:30 - 4:30 pm	Delano at Roseville
Tuesday	10:00 - 11:30 am	Artemediano at Ortiz
	12:30 - 2:00 pm	Datsun at Mosher Way
	2:30 - 4:30 pm	Angus at Zebu
Wednesday	9:00 - 10:30 am	Square Dance at Lopez
	10:45 am - 12:15 pm	Davidson at Rene
	1:00 - 2:30 pm	Marty Robbins

	3:00 - 4:30 pm	Saul Kleinfeld at Bob Mitchell
Thursday	10:00 - 11:30 am	Horizon Hills
	12:30 - 2:00 pm	Sparks Community Center
	2:30 - 4:30 pm	Peyton at Bret Harte
Friday	10:00 - 11:30 am	Moon City Park
	12:30 - 2:30 pm	Donna Marie at Rachel Drive
Saturday	8:00 am - 12:00 pm	Available for special events

Source: SISD Title I coordinator

Between July and October 1997, 325 individuals visited the Dream Machine and checked out 1,882 books.

The Dream Machine is staffed by a teacher who has a commercial driver's license. In the event that the regular driver/teacher is out, the Transportation Department provides a substitute driver. The department also performs and tracks all maintenance for the vehicle.

COMMENDATION

The Dream Machine, a mobile classroom that travels throughout the district, allows preschool-age children, parents, students on intersession, and other members of the community to attend mini-classes, use computers, and check out books.

Chapter 3

Parent Involvement

Involving parents and the community in children's education is essential to effective educational service delivery. SISD has a number of innovative programs to cultivate such relationships.

Parental involvement is strong throughout the district (**Exhibit 3-21**).

Exhibit 3-21

Parent Attendance at Conferences and Open Houses

1996-97 School Year

	Parent-Teacher Conferences (PTC)		Open Houses (OH)	
School	Students in School as of PTC Date	Students whose Parent(s) Attended the PTC	Students in School as of OH Date	Students whose Parent(s) Attended OH
High Schools				
Americas	1,100	660	Combined with Parent-Teacher Conferences	
KEYS Academy	Records unavailable		Records unavailable	
Montwood HS	N/A*		N/A*	
Socorro HS	2,302	825	Combined with Parent-Teacher Conferences	
Middle Schools				
Clarke	970	558	None held	
Montwood MS**	Not open		Not open	
Sanchez	1,035	610	None held	
Slider	925	300	Combined with Parent-Teacher Conferences	

Socorro MS	905	358	Combined with Parent-Teacher Conferences	
Elementary Schools				
Helen Ball	1280	1170	1200	800
Campestre	695	474	Combined with Parent-Teacher Conferences	
Chavez**	Not open		Not open	
Myrtle Cooper	861	787	Not Held	
Escontrias ECC	625	453	Combined with Parent-Teacher Conferences	
Escontrias	640	415	Not held	
Hilley	740	360	745	325
Horizon Heights	806	604	Not held	
Hueco	488	450	Combined with Parent-Teacher Conferences	
Benito Martinez	403	364	403	177
O'Shea Keleher	713	392	929	199
Robert Rojas	443	385	Combined with Parent-Teacher Conferences	
Sierra Vista	315	252	503	249
Vista Del Sol	755	476	708	264

**Not Available **Not open in the 1996-97 school year.*

Source: SISD Community Education.

Exhibit 3-22 shows the number of volunteers who signed in at each school from 1995 to 1997.

Exhibit 3-22

Volunteers by School

1995-96 and 1996-97 School Years

	1995-96		1996-97	
School	Number of Volunteers	Number of Hours Volunteered	Number of Volunteers	Number of Hours Volunteered
High Schools				
Americas	Not open	Not open	29	3,614
KEYS Academy	15	4,000	14	4,000
Montwood HS	296	N/A*	N/A*	N/A*
Socorro HS	466	N/A*	325	14,513
Middle Schools				
Clarke	200	N/A*	17	986
Montwood MS**	Not open	Not open	Not open	Not open
Sanchez	93	N/A*	96	2,074
Slider	171	N/A*	26	3,964
Socorro MS	38	1,084	55	1,633
Elementary Schools				
Helen Ball	77	7,035	55	5,374
Campestre	40	3,992	29	1,870
Chavez**	Not open	Not open	Not open	Not open
Myrtle Cooper	34	N/A*	165	5,898
Escontrias ECC	Combined with Escontrias El.	Combined with Escontrias El.	80	8,572
Escontrias s	147	6,400	87	9,000
Hilley	40	1,660	50	2,040
Horizon Heights	131	N/A*	182	8,631
Hueco	87	N/A*	52	8,182
Benito Martinez	181	N/A*	53	4,472
O'Shea Keleher	358	N/A*	68	4,911

Robert Rojas	27	5,832	36	5,907
Sierra Vista	76	2,542	71	2,838
Vista Del Sol	79	N/A*	67	1,855

**Not applicable*

***Not open in the 1995-96 and 1996-97 school year*

Source: SISD Community Education Department

Each school has either a parent/teacher organization or a parent/teacher association. Many schools have parent rooms where parents can convene to work on projects for the school. In some schools, the parent room has become, in effect, a community center.

In some schools, teachers conduct home visits to ensure that parents are involved in their children's education. During these home visits, the teachers may talk with parents about specific issues regarding their children or the school. In some cases, the teachers provide parents with training in how to help their children with their school work.

Parental involvement is a requirement of Title I funding. Since every school in the district is a Title I school, all schools must meet specific criteria regarding parental involvement. The district must show that it consults with parents in planning to meet its students' educational needs. Moreover, the Texas Education Agency's suggested audit procedures include examining Title I recipients to ensure that the district provides services such as literacy training to increase parental involvement. One percent of Title I entitlements over \$500,000 must be spent on parental involvement. In addition, Title I recipients must work with parents to develop a written parental involvement policy. Parents who are active in the district must sign parental engagement pledges.

FINDING

Parental involvement is high in virtually every SISD school. Many schools report that more than 100 parents attend evening functions. Many schools host regular events to bring parents to the schools including science and math fairs, language arts nights, open houses, and other events.

TSPR asked parents four questions about the parental involvement (**Exhibit 3-23**).

Exhibit 3-23

Parental Responses to Community Involvement Survey Questions

	Strongly Agree/Agree	Disagree/Strongly Disagree	No response/Neutral/ No opinion
I am encouraged to be involved at my child(ren)'s school.	73%	13.5%	13.5%
I am involved at my child(ren)'s school.	51.3%	13.5%	35.1%
Many parents are active and involved in my child(ren)'s school.	56.7%	5.4%	37.8%
I feel welcome at my child(ren)'s school.	73%	10.8%	16.2%

Source: TSPR Parent Survey results

SISD schools have instituted a number of creative ways to involve parents in school activities. For example, some schools host a science project night, where parents help students with scientific experiments. At Rojas Elementary, the school hosted a pajama party where children and parents came wearing pajamas and slippers, ate cookies and milk, and read bedtime stories. Each participating family was given a book to take home. Parents at Campestre Elementary have taken on most of the school's decoration, painting murals in the entryway and hallways, making seasonal decorations, and painting a map on the playground to use during games.

Campestre Elementary has other exemplary parent involvement initiatives. Once a month, a parent is asked to host a get-together at his or her house

and to invite up to ten other parents. Two teachers attend and talk to the parents about the school and about their children and receive input from the parents regarding the school. One teacher told the review team that parents initially were suspicious and thought the teachers were there to sell something. Now parents "fight" about who will host the events. They call these events "Tupperware parties."

Each month, Campestre hosts TRIAD, the Triangle of Knowledge. The students, parents, and teachers of a grade level convene for an evening of science projects. Each month, a different grade level participates. Another night each month is dedicated to language arts; parents and students come to the school to make books and work on writing skills. The school provides refreshments for these events.

Campestre's curriculum specialist and teachers also are highly involved in educating the school's parents. One program they developed is Parents as Teachers (PAT), in which the curriculum specialist and one teacher regularly go into the community during the day to teach parents how to teach their kids. Teachers also teach parents to read through the Pledge to Read program. Parents can check out books from the school's library.

A parent leads the school's pep squad and cheerleaders. Parents made uniforms for both the pep squad and the cheerleaders with \$100 budgeted for materials. Parents also made gowns for the school's choir. In addition, parents are beginning a ballet folklorico class for the children.

COMMENDATION

Parent involvement is strong at virtually every school in the district, and schools have been creative in finding new ways to involve parents in their children's education.

FINDING

As noted above, many SISD schools have designated parent rooms (**Exhibit 3-24**) so parents can work together and make their commitment known to students and staff. While numbers are not tracked at every school, principals and teachers describe these rooms as "always full." Members of the review team regularly observed parent rooms with two to ten people present. The principal at Campestre is considering allocating a larger parent room to accommodate the large number of parents who use the facility.

Exhibit 3-24

Parent Rooms by School

Fall 1997

School	Number of Parent Rooms	Capacity per room
Benito Martinez	1	15
Campestre	2	35/25
Chavez / Montwood Middle School	1	10
Escontrias	1	30
Escontrias ECC	1	20
Hilley	1	25
Helen Ball	1	25
Horizon Heights	0	N/A
Hueco	2	25/25
Myrtle Cooper	0	N/A
O'Shea Kelleher	0	N/A
Robert Rojas	0	N/A
Sierra Vista	1	25
Vista del Sol	0	N/A
Sanchez MS	1	10
Socorro MS	1	30
Clarke MS	0	N/A
Slider MS	0	N/A
Americas HS	1	12
Montwood HS	0	N/A
Socorro HS	0	N/A

Source: SISD Community Education Department

At some schools, the parent room has become a de facto community center. For example, at Campestre Elementary School, cans of food are

stored in one of the parent rooms and distributed to the community's less fortunate.

COMMENDATION

Many schools have designated parent rooms where parent volunteers can work together to make their commitment and presence known to students and faculty.

Chapter 4

PERSONNEL MANAGEMENT

This chapter addresses SISD's personnel management functions and policies in five sections:

- A. Management and Operations
- B. Salaries and Benefits
- C. Recruiting, Hiring, and Termination
- D. Training/Staff Development
- E. Performance Evaluation

Factors critical to the success of any human resources department include the efficient processing of all personnel actions; appropriate staffing of all district functions; appropriate pricing of all district salaries and benefits; compliance with state and federal personnel laws; and the provision of adequate training opportunities for staff development.

SISD's Human Resources Department attracts and retains good employees by providing competitive salaries and benefits for most of its professional staff. However, the department relies heavily on manually intensive processes that lead to overstaffing, and needs to tighten controls over the tracking of hours and record keeping.

BACKGROUND

SISD's Human Resources Department is responsible for many of the traditional functions one would expect. However, due to the district's implementation of site-based decision-making (SBDM), some personnel management responsibilities are shared by other departments and individual schools. Other functions are solely the responsibility of the schools or other departments (**Exhibit 4-1**).

Exhibit 4-1

SISD Personnel Management Responsibilities

Responsibility	Department
Recruiting staff	All departments

Hiring staff	Human Resources; all departments participate
Background checks	Human Resources
Reference checks	Human Resources
Initial salary determinations	Human Resources
Salary adjustment calculations	Human Resources
Compensation studies	Human Resources
Attendance monitoring (employees)	All departments; Human Resources
Benefits administration	Human Resources
Employee grievances	All departments; Human Resources
Training / staff development	All departments
Termination	All departments; Human Resources
Planning for staffing levels	Human Resources; Board

Source: SISD Interviews

Like most employers, SISD must comply with a variety of federal laws governing human resources management, including the Fair Labor Standards Act (FLSA), which governs wages and hourly payments; the Americans with Disabilities Act, which requires employers to provide reasonable accommodation to any employee or job applicant who has a disability; and the Equal Employment Opportunity Act, which prevents employers from making hiring and firing decisions based on age, race, religion, gender, or other factors not related to performance. There are also state laws governing school district personnel administration.

SISD's Board of Trustees has established a Human Resources Committee to oversee the operations of the Human Resources Department and to review human resources issues before they are brought to the attention of the full board. This committee is made up of three board members and the superintendent and meets as needed, usually a few days before each regularly scheduled board meeting.

SISD has experienced substantial growth in enrollment over the past five years, which has necessitated a fairly substantial increase in district employment (**Exhibit 4-2**).

Exhibit 4-2

Number of Employees, SISD

1993-94 through 1997-98

	1993-94	1994-95	1995-96	1996-97	1997-98*
Number of Employees	2,109	2,235	2,175	2,353	2,728
Number of employees in Human Resources	15	18	19	19	21
Ratio of Human Resources employees to total staff	141:1	124:1	114:1	124:1	130:1

* As of August 12, 1997

Source: Academic Excellence Indicator System, Texas Education Agency; SISD

For purposes of the Academic Excellence Indicate System, the Texas Education Agency categorizes SISD staff into four groups: administrative personnel, teachers, paraprofessionals, and auxiliary personnel. **Exhibit 4-3** compares SISD's percentage of employees in each group in the 1996-97 school year with its peer districts. SISD has the highest percentage of auxiliary employees (27.5 percent) and the lowest percentage of paraprofessionals (13.5 percent). SISD has the second-highest percentage of administrators and the third-highest percentage of teachers, behind Ysleta and Southwest ISDs, due primarily to the twelve month operation of schools with year-round education (YRE).

Exhibit 4-3

Percent of Staff by Category

1996-97 School Year

	Administrators	Teachers	Paraprofessionals	Auxiliary
Southwest ISD	4.2	56.5	18.4	20.9
Socorro ISD	3.7	55.3	13.5	27.5
United ISD	3.2	50.9	19.6	26.3
El Paso ISD	3.1	54.8	15.0	27.1
Ysleta ISD	3.0	57.8	13.9	25.3

Laredo ISD	2.6	43.7	27.4	26.3
Pharr/San Juan/Alamo ISD	2.5	45.9	25.1	26.5
Edinburg ISD	1.9	48.5	23.2	26.4

Source: Academic Excellence Indicator System, Texas Education Agency

Payroll accounts for almost 70 percent of SISD's 1997-98 budget (**Exhibit 4-4**).

Exhibit 4-4

SISD Budget

1997-98 School Year

Category	Amount	Percent of Total
Payroll Costs	\$90,938,900	70%
Contracted Services	8,450,968	6%
Supplies & Materials	9,357,956	7%
Other Operating Expenses	2,379,596	2%
Debt Service	12,512,754	10%
Capital Outlay	7,174,931	5%
Total	\$ 130,815,105	100%

Source: SISD Proposed Budget, 1997-98

Instruction-related salaries account for almost 68 percent of the total payroll (**Exhibit 4-5**).

Exhibit 4-5

Payroll Costs by Function

1997-98 School Year

Function	Amount	Percent of Total
Instruction Related	\$61,648,984	67.8%

Instructional Administration Related	7,671,550	8.4%
Pupil Service Related	11,557,638	12.7%
General Administration	2,144,864	2.4%
Plant/Security Service	7,466,580	8.2%
Community Service	449,284	0.5%
Total	\$90,938,900	100.0%

Source: SISD Proposed Budget, 1997-98

SISD has slightly more Hispanic (53 percent) than Anglo teachers (44 percent). However, Hispanics account for 89 percent of the student body (**Exhibit 4-6**).

Exhibit 4-6

Percent Ethnicity of Teachers and Students

1996-97 School Year

	Teachers	Students
Anglo	44.1	9.3
Hispanic	53.1	89.0
African-American	2.0	1.2
Asian / Pacific Islander	0.4	0.4
Native American	0.4	0.1

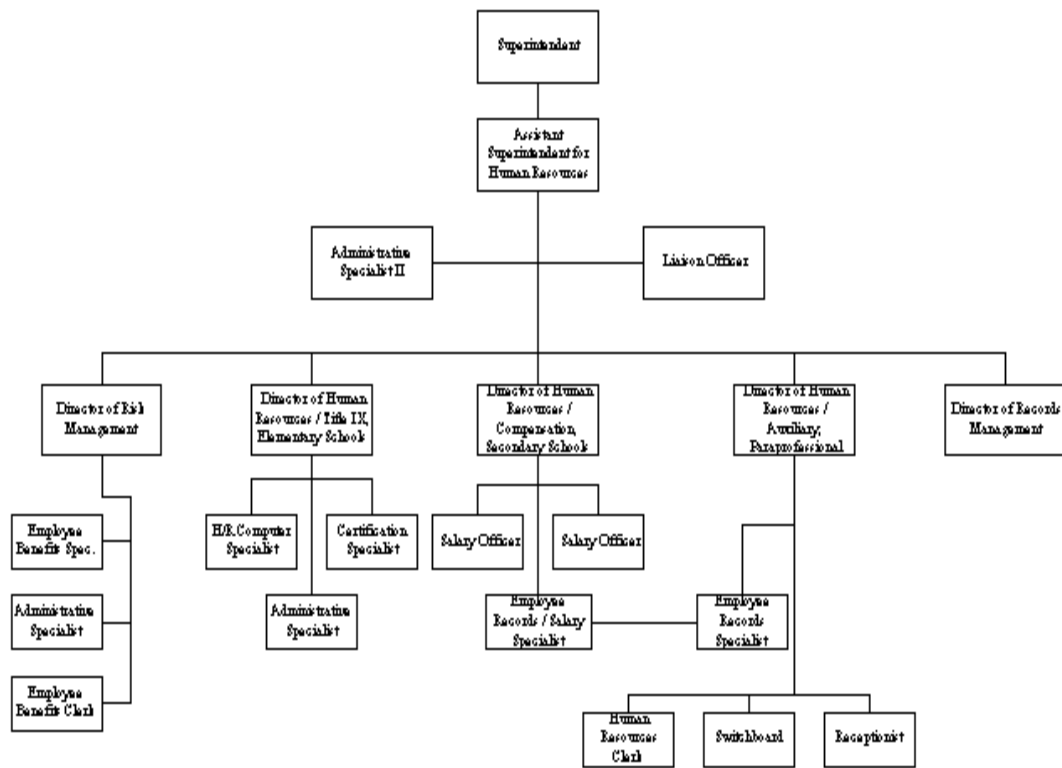
Source: Academic Excellence Indicator System

Chapter 4 MANAGEMENT AND OPERATIONS

SISD's Human Resources Department is headed by an assistant superintendent for Human Resources and is staffed by five directors and 15 support personnel (**Exhibit 4-7**).

Exhibit 4-7

Human Resources Department Organization



Source: Human Resources Department, SISD

According to the assistant superintendent for Human Resources, the five directors are cross-trained to allow any one director to perform the duties of any other in the event he or she is on leave. The division of duties among the assistant superintendent and the five directors is displayed in **Exhibit 4-8**.

Exhibit 4-8

Responsibilities of Human Resources Directors

Position	Responsibility
Assistant Superintendent for	<ul style="list-style-type: none"> Oversees department
Human Resources	<ul style="list-style-type: none"> Develops and revises personnel policies, rules, and regulations
	<ul style="list-style-type: none"> Plans and implements district programs for the recruitment, selection, orientation, and assignment of employees
	<ul style="list-style-type: none"> Develops and monitors departmental budget
Director of Human Resources - Salary and Secondary Schools	<ul style="list-style-type: none"> Conducts studies to ensure that district salaries are in line with the market
	<ul style="list-style-type: none"> Works with the superintendent and board to determine amount of annual, across-the-board salary increase
	<ul style="list-style-type: none"> Calculates salary and applicable stipends for every employee each year
	<ul style="list-style-type: none"> Calculates midyear adjustments to individual salaries as circumstances warrant
	<ul style="list-style-type: none"> Oversees hiring of secondary school professionals
Director of Human Resources - Title IX and Elementary	<ul style="list-style-type: none"> Conducts investigations into equal opportunity and sexual harassment complaints brought by employees
Schools	<ul style="list-style-type: none"> Oversees substitute teacher program
	<ul style="list-style-type: none"> Oversees teacher certification program
	<ul style="list-style-type: none"> Oversees hiring of elementary and special

	education professionals
Director of Risk Management	<ul style="list-style-type: none"> Administers self-insured workers' compensation program
	<ul style="list-style-type: none"> Oversees and administers employee health insurance program
	<ul style="list-style-type: none"> Oversees and administers other employee benefits (e.g., tax shelter annuity, deferred compensation)
	<ul style="list-style-type: none"> Coordinates employee safety program
	<ul style="list-style-type: none"> Chairs employee benefits committee
Director of Human Resources - Paraprofessional and Auxiliary	<ul style="list-style-type: none"> Oversees hiring, performance appraisals, and termination of paraprofessional and auxiliary employees
	<ul style="list-style-type: none"> Administers district property and casualty insurance coverages
	<ul style="list-style-type: none"> Administers district Job Line
Director of Records Management	<ul style="list-style-type: none"> Oversees management of all district files, including personnel files
	<ul style="list-style-type: none"> Conducts criminal background investigations on all successful applicants for positions for which a background check is required
	<ul style="list-style-type: none"> Notifies district leadership team of sexual offenders residing in district

Source: SISD Human Resources Department interviews

Payroll accounts for nearly 92 percent of the Human Resources Department budget (**Exhibit 4-9**).

Exhibit 4-9

Proposed Human Resources Budget

1997-98 School Year

	Proposed Budget	Percent of Total Budget
Payroll Costs	\$1,307,610	91.7 %
Contracted Services	\$49,760	3.5 %
Supplies and Materials	\$41,000	2.9 %
Other Operating Expenses	\$27,000	1.9 %
Total	\$1,425,370	100.0 %

Source: SISD Proposed Budget, 1997-98

The Human Resources Department's payroll expenditures have fluctuated significantly over the last five years (**Exhibit 4-10**). Until 1996-97, the payroll line item in the district budget included a contingency fund to pay for unbudgeted positions that may become necessary through the year. This money, about \$1 million, was moved to another line item in 1996-97.

Exhibit 4-10

Human Resources Department Budget

1993-94 through 1997-98

	1993-94	1994-95	1995-96	1996-97	1997-98
Payroll	\$1,432,432	\$1,335,759	\$1,797,942	\$752,953	\$1,307,610
Contracted Services	\$48,500	\$38,132	\$37,032	\$52,560	\$49,760
Supplies and Materials	\$52,000	\$88,093	\$47,500	\$49,500	\$41,000
Other Operating	\$45,000	\$34,000	\$41,000	\$26,000	\$27,000
Capital Outlay		\$10,500			
Total	\$1,577,932	\$1,506,484	\$1,923,474	\$881,013	\$1,425,370

Source: SISD budgets, 1994-95 through 1997-98

FINDING

SISD is seen as a highly desirable employer among the area's teachers, administrators, and other professionals. The Human Resources Department maintains a database of applications from prospective teachers and has found it easy to hire teachers in most areas as needed during its period of explosive growth.

SISD's teaching staff has grown by 129 percent in the past five years, while enrollment has risen by 122 percent (**Exhibit 4-11**).

Exhibit 4-11

Number of Teachers and Students

1992-93 through 1996-97

	1992-93	1993-94	1994-95	1995-96	1996-97	Percent Change, 1992-97
Teachers (FTEs)	1,006	1,116	1,169	1,194	1,302	129%
Students	16,757	17,608	18,822	20,141	20,500	122%
Student-Teacher Ratio	16.7 : 1	15.8 : 1	16.1 : 1	16.8 : 1	15.8 : 1	

Source: PEIMS

In interviews with education experts throughout Texas, TSPR has found that SISD has a very good reputation. Furthermore, parents told the review team that they deliberately moved into SISD when they relocated to the El Paso area because of its reputation for high-quality schools. The district's strong reputation is due in large part to dedicated teachers and competent leadership.

COMMENDATION

The Human Resources Department has been very effective in attracting and retaining quality employees that enhance the district's image.

FINDING

Focus groups with teachers and principals indicated that the Human Resources Department is slow in approving personnel action forms (PAFs). The review team, however, found this to be false.

PAFs are used by district supervisors to request the creation of new positions, the elimination of existing positions, authorization of replacements for terminated personnel, changes to pay levels or employee assignments, and other salary and staffing changes.

Upon investigation, the review team found substantial disparities in the time needed for PAF processing. In a sample of 30 requests, one request for a new position was approved within a day, while other requests to fill existing, budgeted positions took up to six weeks to approve. The average total time from request to approval is 16.5 work days. Delays, however, do not appear to be due to the Human Resources Department. On average, the assistant superintendent over the department in which the employee works takes more than nine days to sign a PAF; the assistant superintendent for Finance requires an average of 5.5 days. The assistant superintendent for Human Resources or his designee signs PAF forms in an average of two days from the date of the preceding signature.

Recommendation 26:

Develop policies and procedures to expedite the processing of Personnel Action Forms.

These procedures should include requiring supervisors to fax a copy of the PAF to the appropriate director of Human Resources at the same time they submit it to their assistant superintendent for approval. This would allow the Human Resources Department to complete the preliminary steps necessary to process a PAF, such as preparing a posting for a job vacancy, and would allow Human Resources to track PAFs and follow up with the appropriate assistant superintendent if they are not submitted to Human Resources in a timely manner.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Human Resources works with the superintendent and the board to develop a district policy regarding the amount of time in which PAFs must be approved or disapproved.	July 1998
2	The assistant superintendents for Human Resources, Finance, Instruction, Administration, Strategic Planning, and Support Services establish procedures for faxing PAFs to the Human Resources Department simultaneously with their submission	July 1998

	to the appropriate assistant superintendent.	
3	The directors of Human Resources work with the assistant superintendent for Human Resources to develop procedures for tracking PAFs that have been faxed to Human Resources.	July 1998
4	The directors of Human Resources begin tracking PAFs to ensure that they are approved or disapproved in a timely manner.	August 1998

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

Human Resources employs 21 people including the assistant superintendent for Human Resources, five directors, 2.5 salary officers, and 1.5 employee records specialists. This is a substantially larger staff than in most of SISD's peer districts. SISD also has the second-lowest ratio of human resources staff to district employees among its peer districts (**Exhibit 4-12**).

A part of this is explained by the fact that the district has extended contracts for many employees due to the instructional needs of YRE. Contract negotiations and employee set-ups are labor intensive, particularly so in June and July of each year when contracts are signed. Instead of having a full summer to complete this work, SIDS's Human Resources Department must complete their work during a very intense two week break in July.

Exhibit 4-12

Staffing of Human Resources Departments

1997-98 School Year

	Ysleta	SISD	United	Southwest	Laredo	El Paso	Edinburg	Pharr / San Juan / Alamo
Total Students	47,366	21,098	21,387	9,219	22,987	64,444	19,153	20,362

(1996-97)								
Total District Employees (1996-97)	5,172	2,728	2,529	1,099	3,208	7,378	2,482	2,778
Assistant Superintendent for Human Resources	1	1	1	1	1	-	1	-
Director of Human Resources	4	5	2	1	-	6	1	1
Coordinator of Human Resources	4	-	-	1	4	-	-	1
Human Resources Support Staff	32.5	15	11.5	3	12	28	6	5
Total Human Resources Staff	41	21	14.5	6	17	35	8	7
District Employees per Human Resources Employee	126	130	174	183	189	208	310	397

Source: AEIS (total student and district employees); Interviews with SISD and Peer Districts

SISD's ratio of human resources staff members to total district employees has fallen from 141:1 to 130:1 since 1993-94. The median ratio among SISD's peers is 189:1.

It is not clear whether the peers include records management and risk management in their human resource function, however, SISD has six positions in the Human Resources Department that are at the director level

or above. While SISD's peer districts average slightly less than three such positions.

Recommendation 27:

Restructure the Human Resources Department by eliminating one director position, reclassifying the director of Records Management, and eliminating 0.5 employee records specialists.

This would create an organizational structure more in line with the standards established by SISD's peer districts.

The director of Records Management should be made a coordinator to align this position with other positions with similar levels of responsibility, such as the coordinator of Support Services.

In the new structure, one director would remain responsible for risk management and employee benefits. A second director would oversee the hiring of paraprofessional and auxiliary employees and spearhead the district's Title IX program. The third director would conduct classification and compensation studies and be responsible for hiring teachers for all grade levels. This position also would be responsible for tracking teacher and administrator certifications.

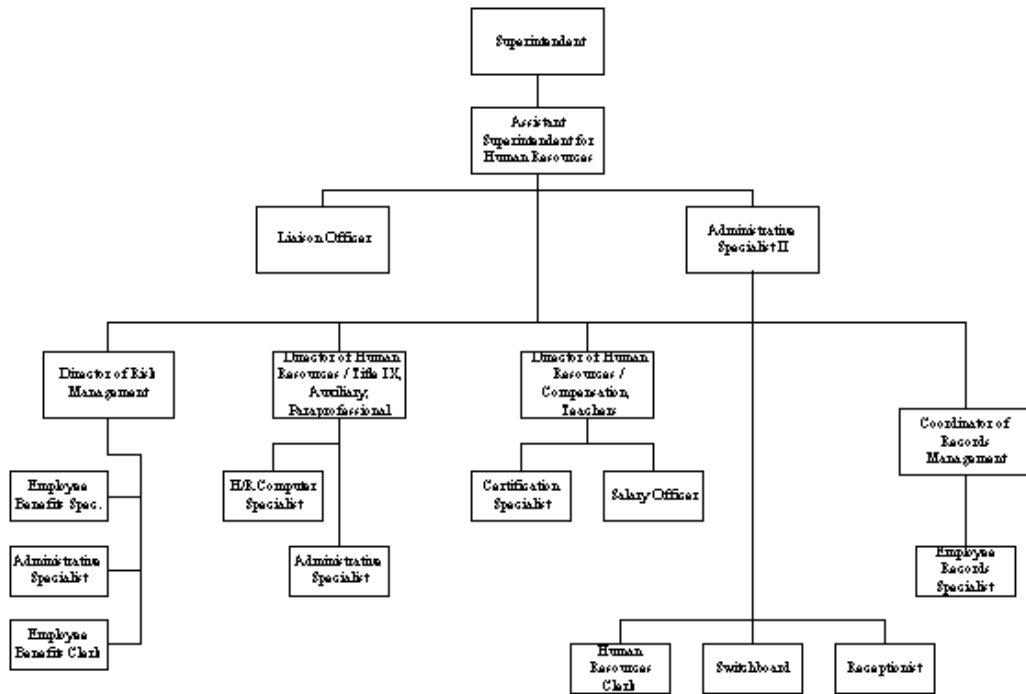
The employee records specialist who currently reports to the director position that would be eliminated would report to the coordinator of Records Management. The certification specialist, who currently reports to the director of Human Resources - Title IX and Elementary Schools, would report to the director of Human Resources - Compensation and Teachers. The receptionist, switchboard operator, and human resources clerk who currently report to the director in charge of paraprofessional and auxiliary employees would report to the secretary to the assistant superintendent.

Given the fact that SISD is in session all year, it is reasonable that SISD's ratio of total employees to Human Resources staff remain slightly lower than the peer average. This recommendation would leave Human Resources with 18 employees, creating a ratio of 152 district employees for each Human Resources staff member. And, some effort should be made to supplement staff during the critical period in June and July.

The suggested organization chart for the restructured department is shown in **Exhibit 4-13**.

Exhibit 4-13

Proposed Human Resources Department Organization



Source: Neal & Gibson

The elimination of 1.5 salary officers is discussed in a separate recommendation.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Human Resources establishes a methodology for determining an appropriate staffing level for the Human Resources Department.	June 1998
2	The assistant superintendent for Human Resources eliminates the director of Human Resources - paraprofessional and auxiliary position.	July 1998
3	The assistant superintendent for Human Resources reclassifies the director of Records Management as a coordinator.	July 1998
4	The assistant superintendent for	July 1998

	Human Resources eliminates 0.5 employee records specialists.	
5	The assistant superintendent for Human Resources reorganizes the department to reflect the changes in reporting relationships.	August 1998

FISCAL IMPACT

Eliminating a director and the half-time employee records specialist would save the district \$84,636 each year in salaries and benefits. Reclassifying the director of Records Management as a coordinator would save \$38,740 in salaries and benefits each year.

Because the director of Records Management would not be asked to take a pay cut, savings for the reclassification of this position do not appear until the third year, giving the district enough time to transfer the incumbent into another director-level position.

The savings realized from eliminating a director of Human Resources are calculated based on the current salary of the director of Human Resources - Auxiliary and Paraprofessional, \$72,594 annually in salary and benefits.

One employee currently divides time between employee records specialist and salary officer. This person's salary is \$20,783.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Eliminate one director of Human Resources	\$72,594	\$72,594	\$72,594	\$72,594	\$72,594
Reclassify director of Records Management	-	-	\$38,740	\$38,740	\$38,740
Eliminate .5 employee records specialists	\$12,042	\$12,042	\$12,042	\$12,042	\$12,042
Total	\$84,636	\$84,636	\$123,376	\$123,376	\$123,376

FINDING The district's salary calculations and absence tracking processes are manually intensive and contribute to the need for additional staff in the Human Resources Department.

Salary adjustments are made in the following circumstances:

- Annual, across-the-board adjustments.
- Additional duties (such as coaching or sixth-period duties) that merit a stipend.
- Prorating salaries for new employees beginning work midyear.
- Prorating salaries for employees who go on extended leave or terminate employment midyear.

Exhibit 4-14 displays the district's process for calculating salary adjustments.

Exhibit 4-14

Salary Adjustment Calculation Process

Example: Mid-Year Replacement Hire

Step	Action
1	Personnel Action Form (PAF) is initiated by a department or school and forwarded to the appropriate assistant superintendent for approval.
2	The assistant superintendent overseeing the originating department or school approves the form and forwards it to the assistant superintendent for Finance.
3	The assistant superintendent for Finance certifies that the funds are available and forwards the form to the Human Resources Department, where it is routed to a salary officer.
4	The salary officer determines the daily base rate of pay for the individual based on years of experience.
5	Using the color-coded academic year calendar, the salary officer manually counts the number of days remaining in the year for the track in which the individual will work.
6	Using the calendar and the memo issued by the appropriate school regarding the timing of in-service days, the salary officer counts the number of in-service days remaining in the year.
7	The salary officer requests a report that tells how much of any applicable stipends have been paid so far for the year. This amount is subtracted from the total amount by the salary officer to determine the total amount of any applicable stipends to be paid to the new hire.
8	The salary officer counts the number of paychecks remaining in the year, and divides the remaining stipend amount by the number of paychecks.
9	The salary officer determines the total amount to be paid in each paycheck by multiplying the daily rate of pay by number of days remaining in year, adding stipend amounts, and dividing by

	the number of pay periods remaining in the year.
10	The director of Human Resources for Salary and Secondary Schools approves the work-up and returns the completed form to the salary officer.
11	The form is separated. Original is sent to Finance for payroll; a copy is forwarded to Benefits; another copy is forwarded to the Human Resources computer specialist for inclusion in the absence tracking system; and a final copy is filed at the salary desk.

Source: Human Resources Department interview

Absence tracking is needed to ensure that critical functions are covered every day and that employees do not abuse leave. At SISD, employees are required to report absences using the Absence Tracking System, an automated, menu-driven call-in system. When teachers call in to the system, it automatically finds a substitute for the duration of the teacher's absence. For all other employees, the system simply records their absence from work.

Schools and departments track all employee absences manually. In most schools or departments, a secretary or clerk is responsible for recording employee absences each day. At the end of the week, the school or department's absences are reported to Human Resources and checked against the records in the Absence Tracking System.

In practice, the system is highly duplicative and its data are prone to inaccuracies. **Exhibit 4-15** outlines the process.

Exhibit 4-15

Employee Absence Tracking Process

Step	Action
1	Employee calls automated Absence Tracking System to report his absence.
2	Employee calls supervisor or clerk/secretary in charge of tracking departmental absences to report his absence and receive approval to take a personal leave day.*
3	Clerk/secretary records absence on handwritten form.
4	Human Resources computer specialist runs weekly report from the Absence Tracking System by each department and school and sends to clerk/secretary for verification.
5	Department/school clerk/secretary verifies Absence Tracking System report against handwritten log of weekly absences.

6	Clerk/secretary signs report to indicate that it is correct as is or corrects the information provided and returns it to Human Resources computer specialist.
7	Human Resources computer specialist uploads information from Absence Tracking System to Pentamation to record absences as leave taken against each employee's leave balance.
8	Human Resources computer specialist manually enters department/school corrections into Pentamation.
9	Human Resources computer specialist checks to see whether each employee's leave taken is within the amount available to that employee.
10	Employees who have used more than their available leave balance are docked a day of pay for each day of leave used beyond available leave balance.
11	Human Resources computer specialist notifies salary officer of number of days to be docked.
12	Salary officer calculates total amount of pay to be docked and notifies Payroll.

**Note: Employees are not required to call supervisors to notify them of absences; this is a courtesy practiced by some employees*

.Source: Human Resources Department interviews

According to the Human Resources Department, SISD's schools and departments track absences with differing degrees of stringency. In addition, some schools and departments do not comply with the department's requests for absence verifications. This leads to abuses of the system and to overpayments that, if discovered later by the Human Resources computer specialist, result in docked pay.

In 1996-97, 205 employees were docked a total of \$64,803, according to the District Dock Report produced by the Human Resources Department. Of those, 23 employees were docked between \$500 and \$1,000; six employees were docked between \$1,000 and \$2,000; and three employees were docked for more than \$2,000.

Recommendation 28:

Streamline and automate the Human Resources Department's salary calculation and absence tracking processes.

Specifically, the salary calculation process should be automated so that the following information is entered for each employee at the beginning of the year:

- Track (if applicable)
- Contract days
- Start date
- Daily rate of pay (base salary)
- Daily rate of pay (stipends)
- Leave balance

The calendar of in-service and nonduty days should be stored in the system by track and automatically applied to all employees. All of these features should be programmed into the system that replaces Pentamation.

Moreover, the absence tracking process should be streamlined to eliminate duplicated effort and reduce errors. Teachers should continue calling the Absence Tracking System to ensure that substitute coverage is obtained in a timely manner; all other employees should be required to call their departmental timekeeper, who would enter the absence directly into the Pentamation system or its replacement. At the end of each week, Human Resources would run a report to ensure that it has received proper documentation of extended leave and that no employees have exceeded the number of days of leave available to them.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The Strategic Planning Department incorporates timekeeping requirements into the request for proposals for the replacement for Pentamation.	April 1998
2	Upon rollout of the replacement, the assistant superintendent for Human Resources eliminates the salary officer positions.	February 1999

FISCAL IMPACT

Automating the salary calculation process would allow the district to eliminate 1.5 salary officer positions. Streamlining and automating the absence tracking process would result in increased productivity.

The salary officer positions would not be eliminated until after the new districtwide payroll software is rolled out, which is estimated to be in

February 1999. In the first year, TSPR estimates that four months' salaries and benefits would be saved (March through June 1999).

The full-time salary officer receives an annual salary of \$35,009. The employee who spends half time on salary computations receives a salary of \$20,783.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Automate the Human Resources salary calculation and absence tracking processes	\$17,147	\$51,440	\$51,440	\$51,440	\$51,440

FINDING

SISD's personnel files are sometimes incomplete and controls over confidential files can be improved.

To comply with state and federal regulations, district personnel files on current and former district employees must be maintained for a minimum of five years. According to standard human resources practice, information maintained in each individual's file should include:

- application for employment
- reference checks
- certifications
- transcripts
- demographic information
- a record of all salary actions
- a record of all policy and procedure documents received by the employee

SISD's Administrative Regulation DBA lists the required contents of each employee's personnel file as "applications for employment, references, and records relative to compensation, payroll deductions, evaluations, and such other matters as may be considered pertinent to the purposes of this policy." (Source: *SISD Administrative Regulation DBA, approved 4/3/97*)

Standard practices dictate that sensitive health-related information should be stored in a separate, locked file. This reduces the employer's liability in the event of a claim of discrimination under the Americans with

Disabilities Act by ensuring that supervisors cannot see health-related documents when making employment decisions.

TSPR found that SISD's personnel files are inconsistent and do not contain only the information considered standard by most personnel offices. The review team conducted a review of seven teachers' personnel files selected at random. **Exhibit 4-16** summarizes the findings of that review.

Exhibit 4-16

Summary of Information Contained in Personnel Files

Review Conducted January 27, 1998

	File 1 Hired 84-85	File 2 Hired 88-89	File 3 Hired 93-94	File 4 Hired 94-95	File 5 Hired 94-95	File 6 Hired 95-96	File 7 Hired 97-98
Application	*	*	*	*	*	*	*
References	*		*	*	*	*	*
Certification	*	*	*	*	*	*	*
Authorization for criminal records check		*	*	*	*	*	*
I-9 (certification of citizenship/work status)		*	*	*	*	*	*
Transcripts	*	*	*	*	*	*	*
Demographic Information	*	*	*	*	*	*	*
Oath of Office	*	*	*	*	*	*	
Contracts	*	*	*	*	*	*	*
Signed copy of job description		*	*	*	*	*	*
Salary records for each year (none included 1997-98)	85-89, 92-93, -----	92-93, 94-95 missing	94-95 missing	94-95 missing	94-95 missing	*	*

	missing						
Receipts of employee handbook	*	*	*	*	*	*	*
Receipt of safety handbook	*		*	*		*	4
Other	* **	*					

* Performance evaluation instruments.

** Certificate of examination for tuberculosis.

Source: Neal & Gibson

As this review revealed, while some files were complete, some information that should be included in all employee files was missing from some of the files, while other information that should be maintained separately from the general personnel file was included. TSPR also identified problems with the manner in which files are stored. An administrative regulation specifically addresses physical access to SISD personnel files:

All personnel records will be considered confidential and not open to public inspection, and access to files will be limited to school officials authorized by the superintendent to use the files for purposes of this policy as cited above.

Source: SISD Administrative Regulation DBA, approved 4/3/97.

Despite this regulation, the review team found active files located in a small room that remains unlocked during business hours and that is close to the Human Resources Department's unattended reception area. Furthermore, the files are maintained in an open-sided lateral file that cannot be locked.

Archived files are stored at the Support Services Warehouse in an area that has been fenced off to limit access. However, during several visits to the warehouse, the review team noted that the area was not locked, giving visitors and employees alike access to the files. Human Resource employees told the review team that keys to this area are only in the hands of two authorized individuals: the director of Human Resources and a custodian.

Some members of the Human Resources staff do not appear to be fully trained in appropriate file management procedures. During a review of personnel files, a member of the review team was told by an inexperienced member of the SISD Human Resources staff to leave files in the reception area overnight. Upon further investigation, the review team found several other personnel files stacked in the reception area.

These procedures are in conflict with federal and state law and district policy, all of which require that personnel files be kept confidential and that access to them be controlled and limited to human resources staff, the employee's supervisory chain of command, the employee, and others on a need-to-know basis only.

Recommendation 29:

Develop and implement procedures to guide the content and security of district personnel records in accordance with district policy.

The assistant superintendent for Human Resources should develop a checklist of items to be included in each employee's personnel file and examine each active file to verify that the appropriate information is included.

Sensitive health and criminal records should be maintained in a separate, locked file cabinet to which only the file clerk, the directors of Human Resources, and the assistant superintendent of Human Resources have access.

Access to all personnel files should be controlled. Files should be stored in an area with limited access and should be refiled immediately upon use or stored in a locked cabinet until they can be refiled. All Human Resources employees should be thoroughly trained in proper file management techniques upon beginning work in the Human Resources Department.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Human Resources ensures that all Human Resources staff members are trained in the proper handling of personnel files.	April 1998 and ongoing
2	The assistant superintendent for Human Resources develops a list of information that should, and should not, be included in personnel records.	April 1998
3	The assistant superintendent for Human Resources examines file cabinets and other storage areas and makes arrangement to purchase additional cabinets or security	April 1998

	equipment as deemed necessary.	
4	The assistant superintendent for Human Resources designates a staff member to review each current employee's personnel file to ensure that the required information is included and that sensitive information is removed to a separate file.	May 1998
5	The assistant superintended for Human Resources institutes and enforces a policy requiring access to the active and archived personnel file areas to be controlled at all times.	June 1998

FISCAL IMPACT

Additional cabinets or security equipment are estimated at a one time cost of \$1,000.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Develop procedures secure all personnel files	(\$1,000)	\$0	\$0	\$0	\$0

FINDING

Compensatory time accrued by district employees is not tracked by the Human Resources Department. Tracking time worked over 40 hours a week and providing compensatory leave for time accrued by employees who are not exempt from the regulations of the Fair Labor Standards Act (FLSA) is the responsibility of the individual department or school.

While the vast majority of district employees (teachers, administrators, and other professional employees) are exempt from the FLSA's overtime provisions, time worked in excess of 40 hours per week by any "nonexempt" employee must be taken as compensatory time during that same week, so that the total hours worked by the employee during the week do not exceed 40, or must be accrued as compensatory time at a rate of 1.5 times the number of hours worked over 40 in a single work week, up to a maximum of 240 hours accrued. In the event that an employee accrues more than 240 hours of compensatory time, he or she must be paid

for those hours over 240 at a rate of 1.5 times his or her regular hourly wage.

SISD Administrative Regulation DEAD (amended 3/5/96) addresses the district's policies regarding overtime and compensatory time:

The authorization to work in excess of an employee's scheduled workweek is considered an exception to general policies and procedures. When required by operating necessities and/or emergency situations, overtime may be authorized in advance and only under the following circumstances:

- a. Funding is verified and available.
- b. Such time is authorized in advance by the appropriate assistant
- c. Such time is properly documented.

Administrative Regulation DL expands upon this requirement, stating that "no auxiliary employee will work more than forty (40) hours per week without proper authorization. Overtime must have prior authorization from the appropriate assistant superintendent or his/her designee. No other employee may authorize overtime."

In the event of an unfavorable FLSA audit, the U.S. Department of Labor's Wage and Hour Division can impose strict penalties on an employer who is out of compliance with the regulations. In addition to paying back wages, employers found to be willfully disregarding the law may be forced to pay fines of \$1,000 per violation.

In focus group meetings with principals, the review team was told that schools generally do not have money in their budgets to pay employees for overtime worked. Therefore, principals reported that most employees take compensatory time in lieu of overtime payments. However, district employees told the review team that many supervisors do not require them to take compensatory time within the same week in which it is earned, and the lack of centralized record-keeping makes it impossible for the district to ensure that employees who accrue compensatory time off take it within the time allowed by the act and district policy.

The district is in the process of introducing a timekeeping system involving magnetic cards that will be issued to all employees. The employee will swipe his or her card through a reader at the beginning and end of each shift. Requiring nonexempt employees to swipe the cards when they go on and off lunch break will provide the Human Resources

Department with an automated record of the actual hours worked by each employee.

Recommendation 30:

Track time accrued by FLSA nonexempt employees at the district level to ensure that U.S. Department of Labor regulations are followed.

Time should be tracked through the timekeeping system now being implemented.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The Strategic Planning Department programs the pilot magnetic card reader program to print a weekly report of all nonexempt employees who work more than 40 hours in the week. Human Resources begins tracking overtime hours worked.	April 1998
2	The assistant superintendent of Human Resources assigns the responsibility of tracking overtime hours worked and compensatory time taken to a member of the Human Resources staff.	May 1998
3	The designated Human Resources employee contacts each department and school to obtain the number of overtime hours accrued by each nonexempt employee to date.	June 1998
4	The assistant superintendent for Human Resources contacts the supervisor of any nonexempt employee who is nearing the maximum number of compensatory hours that may be accrued and advises him or her of the situation.	July 1998
5	The assistant superintendent for Human Resources trains all supervisory staff on the Fair Labor Standards Act to ensure that supervisors understand the law and the necessity of adhering to it. This training is repeated on an annual basis.	August 1998

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 4

SALARIES AND BENEFITS

SISD has four separate salary schedules for administrative/professional employees, teachers, paraprofessional employees, and auxiliary employees. Each of these schedules is structured as a pay range and specifies the minimum, midpoint, and maximum daily or hourly pay rates.

Each position is placed on the appropriate salary schedule at the time it is created. According to board policy, individuals are paid within the salary range for their position except in very special cases; board approval is required to pay any employee above the approved salary range for his or her position.

Teachers are paid according to their level of education attained and their years of experience.

Exhibit 4-17 lists the average salaries of SISD teachers by years of experience.

Exhibit 4-17

Average Salaries of Teachers by Years of Experience

1992-93 through 1996-97

	1992-93	1993-94	1994-95	1995-96	1996-97
0 years	\$21,398	\$21,465	\$21,458	\$24,665	\$25,255
1-5 years	\$23,630	\$23,865	\$25,219	\$26,148	\$26,774
6-10 years	\$27,309	\$27,928	\$28,650	\$30,707	\$30,753
11-20 years	\$31,845	\$32,204	\$33,484	\$36,854	\$37,071
More than 20 years	\$37,284	\$38,430	\$39,489	\$43,450	\$44,143

Source: PEIMS

Exhibit 4-18 shows the average salaries of employees by ethnicity. It should be noted that years of experience, education levels, and level of responsibility can directly affect the average salary in any given category.

Exhibit 4-18

Average Salary of all Employees by Ethnicity

1992 through 1997

	1992-93	1993-94	1994-95	1995-96	1996-97
Anglo	\$ 32,599	\$ 33,435	\$ 33,795	\$ 36,613	\$ 37,424
Hispanic	\$ 28,946	\$ 29,657	\$ 29,468	\$ 32,035	\$ 31,971
African-American	\$ 33,741	\$ 33,861	\$ 33,571	\$ 35,443	\$ 35,928
Native American*	\$ 37,586	\$ 39,163	\$ 40,229	\$ 39,763	\$ 40,938
Asian-American	\$ 29,390	\$ 31,993	\$ 29,933	\$ 34,259	\$ 32,771

**Fewer than 10 employees Source: PEIMS*

All full-time employees of the district receive a minimum of ten days of personal leave each year. Each employee receives five days of state-mandated personal leave and between five and seven days of local personal leave, depending on the length of his or her contract. According to district policy, local leave must be used first, followed by state leave. This maximizes the amount of leave that is transferable in the event that an employee takes a job with another Texas school district.

The district has established an employee leave pool. An employee who must take extended leave due to his own, his spouse's, or his child's life-threatening illness can request donations of unused local leave from fellow employees. Employees wishing to donate leave to an employee may complete a form designating the amount of leave to be transferred to the individual. No more than 30 days of donated leave may be used by any employee in a calendar year.

SISD participates in a combination health maintenance organization (HMO)/indemnity health insurance plan. All district employees working more than 20 hours a week are eligible to participate; the district pays the cost of their insurance. The employee is responsible for the cost of insuring family members. **Exhibit 4-19** describes health plan costs and usage in 1996-97; the monthly premium rate and district contribution increased slightly in 1997-98 to \$139.

Exhibit 4-19

Health Insurance Rates

1996-97 School Year

	Number of	Monthly	District	Employee
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	Participants	Premium Rate	Contribution	Contribution
Employee only	2,635	\$133.38	\$133.38	\$0
Employee plus child	581	\$210.75	\$133.38	\$77.37
Employee plus spouse	112	\$258.24	\$133.38	\$124.86
Family	246	\$322.87	\$133.38	\$189.49

Source: SISD Human Resources Department

Comprehensive benefits are available through the plan. **Exhibit 4-20** summarizes these benefits.

Exhibit 4-20

Group Health Plan Benefits

1997-98

Type of Benefit	Description	HMO Copayment Charge	Indemnity Plan Charge
Physician Services	Primary Care office visits, special care, allergy testing, laboratory tests, X-rays, physical therapy, physical exams, well-woman exams, well-baby care (immunizations, injections and pediatric visits), pre- and post-natal care	\$10 per visit	20%
Hospital - Inpatient (pre-authorized)	Semi-private room, labor/delivery rooms, operating room and related services	Plan pays 100%	20%
Hospital - Outpatient - Emergency	Emergency room	\$25 per visit	\$50 (non-participating facility)
Hospital -	Surgery and procedures	\$50 per	20%

Outpatient - Non-Emergency (pre-authorized)		procedure	
Ambulance Service	Ambulance when medically necessary and/or authorized	Plan pays 100%	20%
Mental Health Care - In-Patient (including alcohol or chemical dependency)	Medically necessary treatment for serious mental illness	Plan pays 100%	20% (maximum \$2,000 per calendar year)
Mental Health Care- Outpatient (including alcohol or chemical dependency)	Evaluation, short-term treatment and crisis-intervention	\$25 per visit	50% (maximum of \$1,500 per calendar year)
Prescription Drugs		\$5	20%
Maximum Out of Pocket		\$1,000 Individual/ \$2,000 Family	\$3,000 Individual

Source: FHP Benefit Plan Summary for SISD

The district participates in the Teacher Retirement System of Texas.

FINDING

SISD's health insurance offers the lowest deductibles and copayments of the three major school districts in the El Paso area (**Exhibit 4-21**).

Exhibit 4-21

Health Insurance Deductibles and Co-Pays

SISD vs. EPISD and YISD

	Deductible	Co-Pay (Standard Office Visit)
Socorro ISD	\$250 out-of-area	\$10

El Paso ISD	\$300 out-of-area	\$15
Ysleta ISD	\$300 out of network or area	\$15 PPO \$10 HMO

Source: Interviews

COMMENDATION

SISD's health insurance plan costs its employees less than plans offered by neighboring school districts.

FINDING

Salary increases are given to all employees, regardless of performance. Traditionally, teachers receive pay increases according to the state's minimum salary scale.

No state or federal regulations govern the granting of pay increases to non-teaching employees; however, SISD typically has granted across-the-board increases to all employees without regard to individual performance. This creates a situation in which good performance is not rewarded, nor is poor performance discouraged. In addition, the district is missing an opportunity to motivate poor performers to improve.

Spring ISD has successfully implemented a combination across-the-board/performance-based increase system. The Spring ISD board sets aside two amounts within its annual budget for salary increases, one for employees on regular pay schedules and another for those on the performance-based pay plan. All administrators above the assistant principal level are required to participate in the performance-based pay plan, as are teachers who have reached the top of the regular salary schedule.

Performance-based increases are determined based on the individual employee's annual performance appraisal and the achievement of goals set annually by the employee in consultation with his or her supervisor. The principal (for teachers and assistant principals) or assistant superintendent (for administrators) reviews all performance appraisals within his or her area and ranks employees based on their performance appraisals. These rankings, which include recommendations for pay increases and suggested levels of pay, are submitted to the district superintendent, who makes the final determination of performance pay increases.

Recommendation 31:

Institute a combination across-the-board/performance pay plan for district employees.

Following the Spring ISD model, employees receiving the best performance ratings should receive a greater percentage increase than those receiving average (satisfactory) performance ratings. Employees whose performance rates below satisfactory should not receive a pay increase.

SISD may wish to contact Spring ISD for more information on its performance appraisal system.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Human Resources works with the superintendent and leaders of employee organizations to change district policy to allow for performance-based increases for eligible employees.	July 1998
2	Goals are set by employees and supervisors as the basis for their evaluation.	August 1998
3	The assistant superintendent for Human Resources works with the board to decide the percentage increases allowable for employees receiving various performance ratings.	January 1999
4	The superintendent and board determine the total amount of money that may be spent on performance increases during the 1999-2000 school year.	January 1999
5	Based on the total amount allocated to their department(s), the assistant superintendents or their designees determine the percentage increase to be applied to eligible employee's salary for the 1999-2000 school year.	February 1999

FISCAL IMPACT

This recommendation can be accomplished with existing resources since it involves a reallocation of dollars already set aside for across-the-board pay increases.

FINDING

While all principals work 226 days, SISD's multitrack system places additional responsibilities on campus administration since they have more students and staff to supervise with fewer breaks.

Many principals who head multitrack schools have reported significant burnout after handling more than one track. While schools operating more than one track receive additional assistant principals, many principals feel pressure to remain at the school during intersession to catch up with work that accumulates while classes are in session.

There are a number of other administrative positions that also support multi-track programs, such as the directors of special education, that also feel significant pressures. However, under site-based decision-making, it is principals that are held ultimately responsible for their campuses.

Recommendation 32:

Designate one senior assistant principal at each multitrack school and make that individual acting principal during intersessions.

This would enable the principal to take time off and relieve some of the pressure on that individual. Additionally, this would provide more intensive practical training for assistant principals and enable them to more readily assume the duties of principal upon promotion.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent of Human Resources works with the assistant superintendent for Instruction to develop a job description for the senior assistant principal position and determine the pay range appropriate for this position.	April 1998
2	The assistant superintendent of Instruction includes any additional payroll amounts in the 1998-99 budget.	April 1998
3	Principals and the assistant superintendent for Instruction determine a recommendation for senior assistant principal at each school and submit the recommendation to Human Resources.	May 1998
4	The director of Human Resources - Salary and Secondary Schools performs the calculations needed to bring the recommended individuals in line with the salary range and submits the recommendation to the assistant superintendent for Human Resources.	May 1998
5	The assistant superintendent for Human Resources approves the recommendation as appropriate and notifies the Finance Department of the change in salary.	May 1998
6	The senior assistant principals begin their job duties.	June 1998

FISCAL IMPACT

The total cost to the district of this recommendation would be \$51,163 per year. This assumes that senior assistant principals would be paid at grade 6 on the professional schedule, one grade higher than that of assistant principals, and that there are 14 multi-track schools in the system.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Designate one senior assistant principal at each multitrack school.	(\$51,163)	(\$51,163)	(\$51,163)	(\$51,163)	(\$51,163)

Chapter 4

RECRUITING, HIRING, AND TERMINATION

SISD's standard procedures for hiring are displayed in **Exhibit 4-22**. This example assumes that a teacher is hired at midyear to replace a teacher who resigns.

Exhibit 4-22

Hiring Procedures

Step	Action
1	The principal submits a Personnel Action Form to request that a replacement be authorized.
2	Upon approval of the PAF, the principal obtains a list of applicants for teaching positions from Human Resources.
3	The principal assembles a team consisting of teachers, administrators, and support staff.
4	The principal and/or the team selects possible candidates, obtains their applications from Human Resources, and schedules and conducts interviews.
5	The team makes a hiring recommendation to the principal.
6	The principal submits a Recommendation for Employment requesting that the recommended individual be offered the position.
7	Upon receipt of the Recommendation for Employment, the Human Resources Department contacts the references provided by the individual and submits the individual's personal information to the El Paso Police and Sheriff's departments for a criminal background check.
8	Upon receipt of references and a clear criminal history check, the individual is offered the position.
9	The individual attends an employee orientation session at the Education Center.
10	The new employee reports for duty.

Source: Human Resources Department interviews

The district has a good history of compliance with the federal Equal Employment Opportunity Act. Between 1993 and 1997, 28 complaints

against the district were filed with the Equal Employment Opportunity Commission. Of those, decisions have been reached in 15 cases. Only one of the 15 was ruled in favor of the complainant; and one other was settled by the district (**Exhibit 4-23**).

Exhibit 4-23

Disposition of EEOC Complaints

1993-1997

Action Date	Complainant's Position	Basis of Complaint	Decision
10/93	Bus driver	Religion	Upheld district
10/93	Coordinator	Age discrimination	Upheld district
11/94	Monitor	Age discrimination	Dismissed
12/94	Craft helper	National origin and race	Upheld district
3/95	Teacher	Age, sex, national origin	Relief granted
4/95	Dispatcher	National origin	Upheld district
5/95	Teacher	Age discrimination	Upheld district
9/95	Teacher applicant	National origin and race	Dropped
10/95	Substitute teacher	Age and retaliation	Withdrawn
11/95	Bus driver	National origin	Upheld district
3/96	Teacher	Race	Upheld district
3/96	Custodian	Age and sex	Upheld district
7/96	Teacher	Age discrimination	Settlement
3/97	Applicant	Age	Upheld district
3/97	Bus driver	Sex, national origin	Upheld

		retaliation	district
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Source: SISD

New employee orientation consists of a brief presentation by members of the Human Resources staff that summarizes district policies and procedures. New employees receive the district's employee handbook, information on benefits, and other pertinent information. The Human Resources staff conducts these sessions on an as-needed basis, usually twice a week. If necessary, the sessions are conducted in Spanish. All new employees to the district must attend an orientation session and sign a card indicating that they have received the employee handbook and other information.

FINDING

The district posts announcements of vacancies, advertises for some positions in the newspapers, and maintains an automated telephone job line that is updated weekly.

SISD's automated job line describes available positions in all four employment categories (administrative, teachers, paraprofessional, and auxiliary) and provides callers with information regarding the minimum educational and experience requirements and salary range for each position. Callers also receive instructions for obtaining applications.

COMMENDATION

SISD's automated job line offers individuals interested in working for the district an easy way to obtain information about job openings.

FINDING

SISD finds it difficult to fill some positions, including diagnosticians, computer technicians, transportation workers, and safety and security officers. Therefore it is important for the Human Resources Department to be informed of vacancies or impending vacancies as soon as possible.

Some positions take months to fill. **Exhibit 4-24** shows the amount of time required to fill positions in the MIS (Strategic Planning) department during the 1996-97 school year.

Exhibit 4-24

Length of Time to Fill MIS Positions

Position	Date Vacated	Date Notified	Date Filled	Work Days Elapsed
Help Desk Specialist	07/31/96	09/03/96	09/18/96	34 / 11*
Computer Resource Spec.	09/27/96	09/25/96	10/08/96	7 / 9*
District Attendance Clerk	09/23/96	09/23/96	11/18/96	35
MIS Specialist	08/19/96	08/19/96	09/24/96	25
Computer Resource Spec.	08/21/96	08/21/96	10/01/96	28
MIS Specialist	08/21/96	08/21/96	01/15/97	100
Telephone/CATV Tech.	08/19/96	08/19/96	10/23/96	46
Computer Hardware Tech.	07/01/96	07/01/96	09/30/96	63
Help Desk Specialist	10/07/96	07/23/96	11/15/96	29 / 82*
Computer Resource Spec.	08/21/96	08/21/96	10/07/96	32
Computer Hardware Tech.	02/28/97	02/06/97	03/31/97	21 / 37*
PEIMS Specialist	08/19/96	08/19/96	09/24/96	25
MIS Specialist	01/13/97	10/03/96	01/15/97	2 / 66*
MIS Specialist	08/19/96	08/19/96	11/11/96	59

** Note: the date on which the Human Resources Department was notified of the vacancy was not the date on which the vacancy occurred.*

Source: SISD Human Resources Department

The average number of work days that elapsed from the time the Human Resources Department was notified about each MIS opening to hiring was 45 days. The average number of work days between the actual vacancy and hiring was 37 days. Obviously, the MIS department is often informing Human Resources in advance of anticipated vacancies.

In the Transportation Department, by contrast, the average number of work days between vacancy and hiring is 53 days, while the average gap

between notification of Human Resources and hiring is 45 days. This indicates that the Transportation Department waits an average of eight days after a position is vacated before notifying Human Resources of the vacancy. The Transportation Department told the review team that they notify Human Resources of vacancies within two days, but district records do not support this assertion.

Exhibit 4-25 illustrates the amount of time required to fill positions in the Safety and Security Department during 1996 and 1997.

Exhibit 4-25

Length of Time to Fill Safety and Security Positions

Position	Date Vacated	Date Notified	Date Filled	Work Days Elapsed
Security Guard - PT	3/19/97	3/19/97	4/23/97	25
Security Field Supervisor	09/27/96	9/20/96	9/30/96	1 / 6*
Security Guard	2/14/97	1/28/97	3/11/97	17 / 30*
Security Guard - PT	10/11/96	10/15/96	11/11/96	21 / 19*
Security Guard	9/5/96	9/5/96	10/7/96	22
Security Guard - PT	8/29/96	7/30/96	9/4/96	3 / 25*
Security Guard	10/1/96	10/1/96	11/6/96	26
Security Guard - PT	10/1/96	10/1/96	11/15/96	33
Security Guard	3/10/97	3/19/97	4/22/97	31 / 24*
Security Guard	7/18/96	7/18/96	8/29/96	30
Security Field Supervisor	4/10/96	4/10/96	9/25/96	117
Security Guard	7/18/96	7/18/96	8/29/96	30
Security Guard	9/5/96	9/5/96	10/2/96	19
Security Guard - PT	7/30/96	7/30/96	9/3/96	24
Security Guard - PT	10/1/96	10/1/96	11/6/96	26
Security Guard	2/11/97	1/6/97	3/3/97	14 / 40*
Security Guard - PT	10/9/96	10/9/96	11/22/96	31
Security Guard - PT	7/12/96	7/30/96	9/3/96	36 / 24*

Security Guard	1/6/97	1/6/97	2/12/97	27
Security Guard - PT	3/10/97	3/19/97	5/1/97	38 / 31*
Security Guard - PT	9/18/96	9/18/96	10/28/96	28
Security Field Supervisor	8/17/96	9/20/96	9/25/96	27 / 3*

** The date on which the Human Resources Department was notified of the vacancy was not the date on which the vacancy occurred.*

Source: SISD Human Resources Department

For Safety and Security, the average number of work days between notification of Human Resources and new hiring was 29 days, while the average gap between the actual vacancy and new hiring was 28 days. This suggests that the Safety and Security Department informs Human Resources as each position is vacated, although Safety and Security told the review team that they inform Human Resources of vacancies an average of two weeks before each position is vacated.

Recommendation 33:

Institute districtwide procedures for the timely notification of vacancies throughout the district and aggressively seek to fill those vacancies.

These efforts should be spearheaded by the Human Resources Department. In this way, the district can maximize the amount of time available to recruit and hire the best qualified individuals for open positions.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Human Resources issues a memorandum to all department heads regarding the proper procedures for notifying the Human Resources department of upcoming vacancies.	April 1998
2	The assistant superintendent for Human Resources identifies departments in which hiring traditionally has been a problem.	June 1998
3	The assistant superintendent for Human Resources assigns a staff member to work with those departments to conduct focused recruiting efforts to bring more qualified candidates	July 1998

	into the district.	
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FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

The Human Resources staff told TSPR of instances in which principals have hired an individual without notifying the Human Resources Department. This has created situations in which individuals in positions that require security background checks began work without the background check, as well as instances in which individuals were not entered into Pentamation before beginning work, and therefore did not receive paychecks for their first weeks of work.

Although Human Resources offers training on hiring practices periodically, principals and supervisors are not required to attend, and do so at the discretion of the assistant superintendent who oversees them.

Recommendation 34:

Require all principals and supervisors to attend annual training in district hiring policies and procedures and in state and federal laws governing hiring.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	Conduct training for all supervisors in district policies and procedures regarding hiring.	Annually
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FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

For school administrative openings, the Human Resources Department strongly recommends that schools use hiring committees to interview all applicants who already work for the district in other positions.

Hiring committees are assembled at each school to fill open positions. Generally, these committees consist of the school's principal, assistant principal(s), and up to seven teachers and paraprofessional employees. The entire committee is responsible for selecting applicants to be

interviewed, conducting the interviews, and recommending an applicant to the principal. Depending on the position being filled, each interview can require from 30 minutes to two hours.

The requirement that all applicants already employed by the district be interviewed creates an unnecessary burden upon the hiring committees. While it is important that district employees feel that they can advance within the district, interviewing all in-district applicants eliminates any discretion on the part of the hiring committee to narrow the field to qualified applicants before selecting individuals for personal interviews. During the teacher focus group, TSPR heard of at least one instance in which 29 individuals were interviewed for a single position.

If a committee conducts 30 interviews, each of which last a minimum of 30 minutes, each member will be away from his or her normal duties for 15 hours.

Recommendation 35:

Delegate the decision on the number of in-district employees to interview for open administrative positions to the hiring committees.

While Human Resources should continue to encourage hiring committees to consider in-district candidates for positions, the committees should not be made to feel that it is necessary to interview every in-district applicant.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Human Resources immediately discontinues the practice of recommending that hiring committees interview all in-district applicants for every position.	June 1998
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FISCAL IMPACT

This recommendation could result in savings on substitute teacher salaries. A single instance in which 30 candidates were interviewed for 30 minutes each for a total of 15 hours, or two full days (assuming that five teachers were on the hiring committee) would account for \$500 in salaries for substitute teachers at \$50 per day. However, actual savings will be dependent on the interviews determined necessary by the committee as a whole.

Chapter 4

TRAINING/STAFF DEVELOPMENT

In the spirit of site-based decision-making, most training in SISD is provided at the discretion of the schools or departments. Aside from the new-hire orientation session, the only districtwide staff development activity is the annual "Celebration," held one afternoon at the beginning of each school year.

While administrators receive some standard training, employee training generally is left up to supervisors. For example, principals might receive training in sexual harassment issues; it is then up to them to hold training for teachers and other administrators at their schools.

Teachers receive five in-service days each year. Principals determine the training to be provided to their staff.

FINDING

Some schools encourage teachers to conduct home visits with families, and provide credit for in-service days for such visits.

These schools train teachers in how to conduct effective home visits before sending them out on these visits. Teachers who have received this training spoke very highly of its quality and of the results achieved from home visits.

At Campestre Elementary School, for example, pairs of teachers visit parents to teach them how to teach their children. This program is called Parents as Teachers (PAT). In addition, each month the parent of a Campestre child is asked to host a get-together at his or her house and invite up to ten other parents. Most of the parents call these "Tupperware Parties." Two teachers attend and talk to the parents about the school and their children; parents are asked to provide input to teachers regarding the school. For each of these activities, participating teachers receive up to two days' credit for in-service training.

COMMENDATION

Some SISD schools offer innovative training for teachers and creative ways to use in-service days.

FINDING

The district does not provide standard training to all employees in the areas of sexual harassment, ethics, on-the-job safety, and district policies and procedures. According to district policy, training staff in these areas is left to the principals; no record of training received is kept by the district.

The district did, however, provide documentation to the review team on sexual harassment training provided to various groups of employees. Support Services employees have not received this training since January 1995 and only Keys Academy staff have received training on sexual harassment since October 1996. Given turnover rates in the district, this is inadequate.

Furthermore, although PDAS training was provided to school administrators and teachers, other supervisors have not received training in performance appraisals, nor do principals and supervisors receive mandatory training in proper hiring practices or other topics relating to their managerial responsibility. While some training is "required," district officials noted that with people on different tracks and schedules, it is hard to get everyone into every class.

Recommendation 36:

Implement a set of required training topics for all district employees.

This training should include sexual harassment, ethics, and district policies and procedures.

Supervisors should receive training in hiring, performance evaluations for non-teaching positions, and termination.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Human Resources immediately implements a training program on a standard set of topics for all district employees.	June 1998
2	The assistant superintendent for Human Resources designates a staff member to be responsible for tracking the training received by all employees. This information should be kept in each employee's personnel file.	June 1998

FISCAL IMPACT

This recommendation can be achieved using existing resources.

Chapter 4

PERFORMANCE EVALUATION

Beginning in 1997-98, SISD teachers are being evaluated using the PDAS system. Until this year, principals evaluated teachers on the basis of the Texas Teacher Appraisal System.

PDAS requires principals to evaluate teachers on their performance in eight areas, including student participation, instruction centering on the needs of the students, feedback to students on their progress, discipline management, communication skills, professional development, compliance with policies and procedures, and improvement of academic performance of all students on the campus based on the Academic Excellence Indicator System.

For nonteaching staff, performance evaluations are based on the duties set forth in each employee's job description. Evaluation instruments for administrative positions ask the supervisor to rate the employee on each critical job element on a scale of 1 to 5, with 1 being unsatisfactory and 5 being clearly outstanding. The total score for all job elements is divided by the number of job elements to achieve an overall rating between 1 and 5. The supervisor then details specific steps for improvement.

Paraprofessional and auxiliary employees are evaluated using a standard appraisal instrument. This instrument requires the supervisor to evaluate the employee in eight areas, including job knowledge, attendance, work attitude, safety, amount of work, quality of work, personal habits, and initiative. In each area, the supervisor grades the employee between A, which describes the best performer, and D, which describes the worst performer. The supervisor then can comment on areas in which the employee excels and needs improvement, and provide specific suggestions for improvement.

FINDING

The district uses job descriptions for each administrative position as the basis for that position's performance appraisal document. However, the existing job descriptions do not provide a sound basis for evaluating job performance. The job descriptions include highly subjective terms and unmeasurable goals.

Exhibit 4-26 displays excerpts from SISD job descriptions and performance evaluation instruments.

Exhibit 4-26

Sample Performance Evaluation Criteria

Position	Job Description /Performance Appraisal Language	Problem
Coordinator of Transportation	Makes a positive effort in supporting the district's objectives and goals for the betterment of the students and the environment.	Determining what constitutes a "positive" effort.
	Maintain good public relations with staff and community which will convey camaraderie and mutual respect.	Quantifying feelings of camaraderie and mutual respect.
Assistant Superintendent for Human Resources	Deals sensitively and fairly with persons from diverse cultural backgrounds	Determining what constitutes "sensitive and fair" dealings with diverse cultures.
	Employs an effective communication process that includes listening to all constituents	Difficult to determine whether <i>all</i> constituents have been heard or whether communication process is effective.
Library Officer	Initials (sic) and support programs and actions that facilitate a positive, caring climate for learning in an orderly, purposeful environment.	A "caring" climate cannot be judged in an objective manner; nor can a "purposeful" environment.
Assistant Principal	Holds the belief that each student can and will perform up to high standards of achievement through behavior.	Job descriptions cannot prescribe beliefs, nor can beliefs be measured for the purposes of evaluation.

Source: SISD Job Descriptions and Performance Appraisal Instruments.

Recommendation 37:

Rewrite all administrative performance appraisal instruments to make them outcome-based and quantifiable.

While it is good management practice to base performance appraisals on the duties set out in an employee's job description, the job description cannot be used to set expectations. Wherever possible, the performance appraisal instrument should include details that will help quantify how well employees perform their duties. For example, the coordinator of Transportation might be evaluated on how often buses arrive at school on time, as a component of serving the needs of the children; the number of buses that break down while in service, as a component of ensuring children's safety; and the average number of passengers per mile, as a component of designing efficient routes.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Human Resources designates a staff member to redesign all performance appraisal instruments to be outcome-based.	September 1998
2	The assistant superintendent for Human Resources trains supervisors in conducting effective evaluations.	October 1998

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

Chapter 5

FACILITIES USE AND MANAGEMENT

This chapter examines SISD's facilities use and management function in six sections:

- A. Facilities Planning
- B. Facilities Use
- C. Construction Management
- D. Maintenance Operations
- E. Custodial Services
- F. Energy Management

The facilities use and management function is responsible for ensuring that district facilities are designed and built in a way that enhances the educational process and meets other needs; maintaining equipment in peak operating condition; providing a clean school and working environment; ensuring that facilities comply with local, state, and federal building regulations; and minimizing the district's utility costs.

TSPR found that SISD has met the challenge of rapid growth through a combination of new construction, innovative programs such as Year-Round Education (YRE), and shared services with other local governments. In addition, maintenance and custodial operations generally keep district facilities well-maintained and clean. However, SISD lacks a long-term facilities master plan and a design development and construction standards handbook. Moreover, the district should prepare a prioritized list of proposed capital improvements with cost estimates and track preventive maintenance jobs.

BACKGROUND

In SISD, the facilities use and management function is managed by the director of Facilities and the director of Support Services under the direction of the assistant superintendent of Support Services.

SISD has a current enrollment of 22,118 students housed in 23 school campuses and three support facilities containing 2,900,786 square feet of

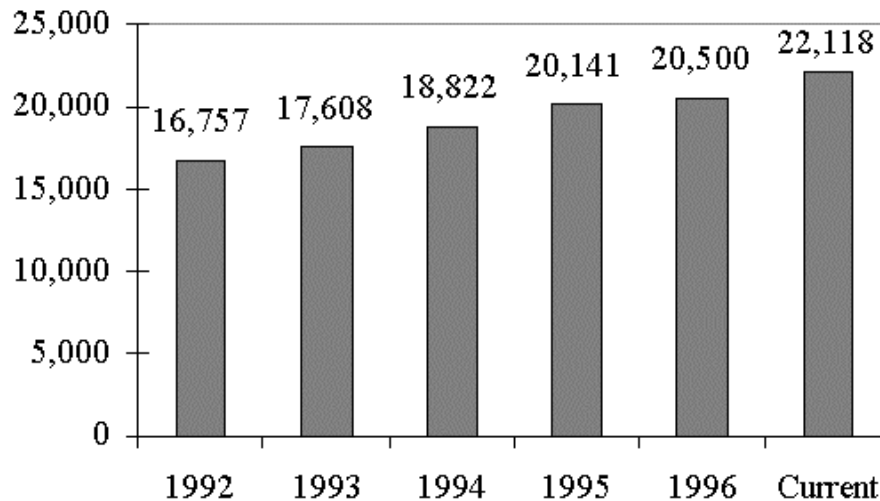
floor area on 322 acres of land. SISD's grade plan includes pre-kindergarten to fifth-grade elementary schools, sixth- to eighth-grade middle schools, and ninth- to twelfth-grade high schools.

In the last few years, SISD has grown tremendously, both in terms of enrollment and facilities. Enrollment has risen from 16,757 students in the 1992-93 school year to its current level of 22,118, an average annual growth rate of 5 percent (**Exhibit 5-1**).

Exhibit 5-1

Growth in Enrollment at SISD

1990-97

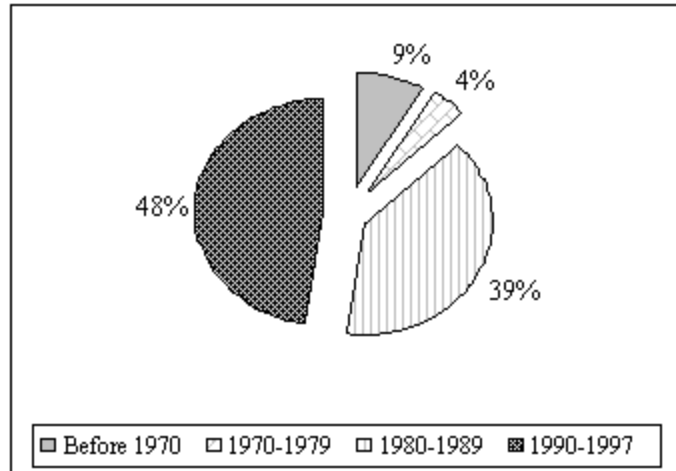


Source: PEIMS

To accommodate this growth, SISD has built 11 new schools since 1990, four since 1995. As a result of this building program, most of SISD's schools are relatively new (**Exhibit 5-2**).

Exhibit 5-2

Date of School Construction



Source: Department of Support Services, SISD

To accommodate even more students, SISD instituted Year-Round Education in 1993. All SISD schools operate on a year-round basis, and many operate on multiple tracks. The district has four tracks-red, green, blue, and yellow-corresponding to four different school calendars. While all district high schools and three elementary schools operate on a single track, all of the middle schools and the remaining elementary schools operate on two, three, or four tracks.

SISD's district boundaries encompass 130 square miles of land, 80 square miles of which is suitable for development. As a result, the district has considerable potential for new housing developments and new residents in the future. In addition, the area south of Interstate 10, called the Valley, is installing a city water and sewer system and will be able to accommodate additional housing in the near future. The district's population also has a higher number of children per household, averaging 2.5 children compared to the national norm of 1.3 children per household. Due to all these factors, the district should expect continuing growth in student enrollment. District management projects that its student population will double over the next 20 years.

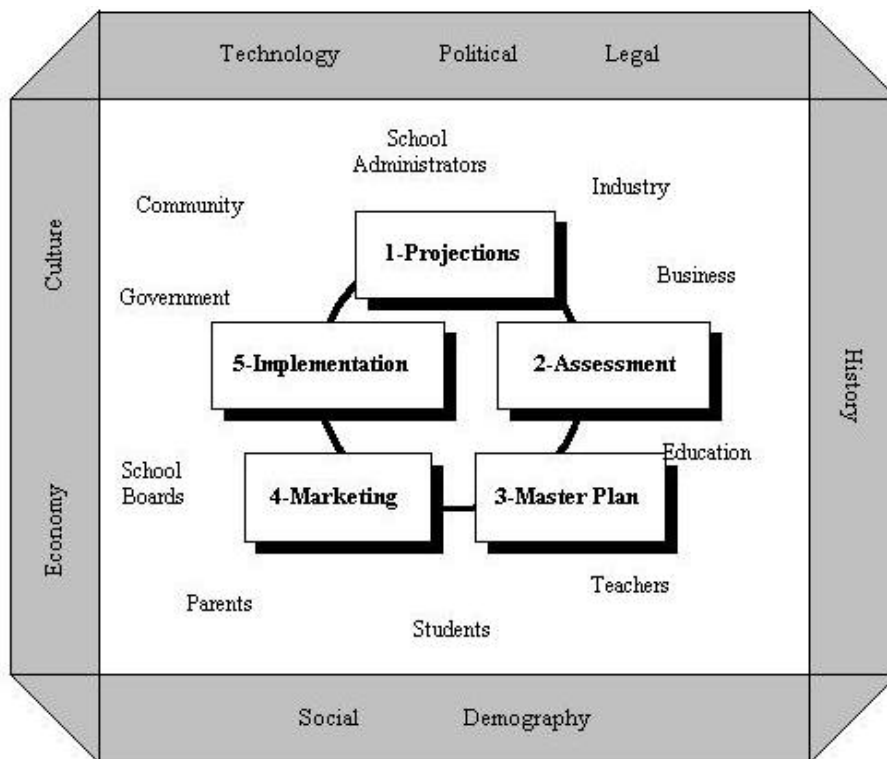
Chapter 5

FACILITIES PLANNING

Effective facilities planning involves a formal planning process and a formal facilities master plan, which serves as a guide for construction and renovation. **Exhibit 5-3** presents a framework for facilities planning efforts. External factors to be considered in facilities planning (shaded area) include demographics; social, cultural, and economic trends; and advances in technology. The exhibit also identifies personnel who should be involved in facilities planning and the major steps required to develop a facilities master plan.

Exhibit 5-3

Facilities Master Planning Model



Source: Neal & Gibson.

An effective master facilities plan builds on the district's strategic plan. It incorporates projected demographic trends, facility repair and renovation needs, and educational and operational space requirements. Community involvement and coordination with school administrators and other key personnel also are important. By involving operations and maintenance personnel in design and construction, facilities planning personnel can ensure that key operations and maintenance issues are incorporated in their

planning. By the same token, facilities managers are involved in the district's strategic planning activities.

SISD has established a facility planning committee called the Blueprint for the Twenty-first Century Committee, which is intended to "to gain the greatest student enrollment capacity in existing and future school buildings, while delivering a quality instructional program through maximization of multi-track year-round education, analysis of grade level configurations, and delineation of campus attendance lines." This committee includes the superintendent; the assistant superintendents of Strategic Planning, Administration, Human Resources, and Instruction; the director of Communications; and administrators, teachers, and parents from schools throughout the district. The committee also includes the assistant superintendent of Support Services. The committee is on hold pending the release of this report.

SISD is negotiating for several school sites north of Interstate 10 and has three middle schools in the planning stages.

FINDING

SISD is not using a facilities master plan to ensure that the planning and construction of new facilities and the renovation of existing facilities are solidly based on the district's anticipated needs. While the district has elements of a facilities planning model, it has not unified them in a comprehensive planning document (**Exhibit 5-4**).

Exhibit 5-4

Status of SISD's Planning Process

Component	Status
Projections	Completed three-year enrollment projections
Assessment	Developed a list of needed capital improvements
Master Plan	None
Marketing	Based on list of proposed bond projects
Implementation	Based on list of proposed bond projects and capital improvement projects

Source: Neal & Gibson

Although SISD's enrollment projections have proven accurate in the past,

the district's completion of new facilities frequently occurs well after the need arises. The former school administration typically delayed projects despite the anticipated demand for additional schools. For most of the schools built in the last ten years, the district was forced to occupy schools before completion, increasing the projects' costs and exposing students to safety hazards. For example, before completion of Sierra Vista Elementary, the district converted the library into temporary classroom space so that students could occupy the facility before regular classrooms were completed. Effective facility planning includes critical timelines designed to ensure that construction is completed well before classes begin.

SISD plans to construct two new schools and expand another school as part of its 1995 bond issue, but the district was unable to provide TSPR with documentation linking its decisions to complete these projects with anticipated growth in the district. The district, moreover, has not made a detailed assessment of the condition of existing facilities or a plan to identify changes in existing facilities needed to accommodate future growth. Because of this, the district presents its facility program to the public not as a strategy to meet current and future needs, but simply as a list of projects proposed in a bond package (see Appendix G).

Facilities assessment is an integral part of the facilities master planning process; it should involve an evaluation of the condition of district facilities built before 1995 and the identification of needed repairs and renovations. The Council of Educational Facility Planners, International, publishes a *Guide for School Facility Appraisal* explaining these types of assessments. This guide outlines the school facility assessment process in six parts: school site, structural and mechanical features, plant maintainability, school building safety and security, educational adequacy, and environment for education.

In keeping with its philosophy of creating community centers, SISD used \$3.9 million in operating funds to build its Aquatics Center. The principal justification for this center was to provide a recreational outlet for district residents in an area with few such amenities. However, without a facilities master plan, the district was unable to effectively assess this project's appropriateness to its projected needs. The district tried to find partners for this project, but was unsuccessful. Despite its considerable financial risk, the district decided to continue the project without partners. The district also did not time the construction of the project properly. Most aquatic centers make the majority of their revenue and income during the summer. The district opened its Aquatics Center in December 1997, missing the summer season.

Facilities personnel also do not always coordinate facility improvements with school administrators and other key personnel. For example, the Facilities Department redesigned the parking lot and drop-off zones at Campestre Elementary without soliciting input from the school's administration or the coordinator of Security Services. As a result, floodlights were not included in the parking lot project, and curbs at the school drop-off areas were not painted red. Had appropriate personnel been consulted, these elements could have been included during the planning phase. As it is, these deficiencies have not been corrected. To do so now would be more costly than doing it right the first time.

Interviews with community members indicated that many believe that they are included in SISD's planning processes simply as a "rubber stamp," and that the district does not solicit information from them to improve the planning process.

Recommendation 38:

Develop a long-range facilities master plan and facilities planning process.

SISD should expand the mission of its Blueprint for the Twenty-first Century Committee beyond its initial focus on multitrack YRE, grade level configurations, and campus attendance lines. The committee should be made responsible for developing a master plan that actively solicits input from business, civic, and religious organizations. The committee should contract with experienced consultants to analyze the major external factors influencing the district's use of facilities, assess the condition of existing facilities, and develop the master plan.

The facilities assessment should identify needed facility improvements to be incorporated into the facility planning process. School educational and operational space guidelines should be established, using minimum state standards as a starting point, for classrooms and common areas such as cafeterias and libraries.

The independent consultant should develop a comprehensive facilities master plan and provide the district with an electronic version to facilitate future annual updates. SISD should define projects for future bond issues based on its facilities master plan.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The Board of Trustees changes the mission of the Blueprint for the Twenty-first Century Committee to include the development of a facilities master plan.	May 1998
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2	The superintendent authorizes and the committee selects a consultant to analyze the external factors affecting current and future district facility usage and to update the district's enrollment projections.	June 1998
3	The superintendent authorizes and the committee selects a consultant experienced in facility evaluations to conduct a detailed facilities assessment.	August 1998
4	The superintendent authorizes and the committee selects a consultant to compile a comprehensive master plan for the district.	October 1998
5	The committee circulates the master plan to key community leaders to gather their feedback.	December 1998
6	The superintendent and Board of Trustees make any needed changes and approve the master plan.	January 1999
7	The assistant superintendent of Support Services uses the master plan for future capital improvements and planning projects funded by future bond issues.	February 1999

FISCAL IMPACT

The cost of consulting services to assist in the analysis of external factors affecting the current and future use of the district's facilities is estimated at \$15,000. The facility assessment cost is estimated at \$500 for elementary schools, \$1,000 for middle schools, and \$1,500 for high schools, for a total cost of \$14,000 for 12 elementary schools, four middle schools, the KEYS Academy, and two high schools. The cost of compiling a facilities master plan is estimated at \$25,000 in consulting fees. The other components of the facilities master plan, including community input, can be accomplished within existing resources.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Develop a facilities master plan.	(\$54,000)	\$0	\$0	\$0	\$0

FINDING

The assistant superintendent of Support Services and the director of Facilities are responsible for facility planning and facility construction and renovations. The director of Support Services is responsible for facility maintenance. However, electric, energy, and plumbing personnel report to the director of Facilities rather than the director of Support Services, resulting in fragmentation of the maintenance function. Because of this reporting arrangement, Facilities personnel have had to rely on outside parties to determine its preferences in the selection of materials and systems.

The assistant superintendent of Support Services resigned in September 1997. Up until this position was filled in February 1998, the assistant superintendent of Administration had assumed his responsibilities on an interim basis. The director of Facilities position is now vacant; these duties have been assigned to the director of Support Services on an interim basis; the director of Support Services is acting as the interim Facilities director until this position is filled. Even before these vacancies occurred, it was reported to the review team that poor communications between Support Services and Facilities have made it difficult to coordinate effectively.

Recommendation 39:

Permanently move the electric, plumbing, and energy management functions under the director of Support Services.

This reporting arrangement will allow Facilities to focus on new construction and capital improvements. Support Services should focus on upkeep and maintenance of current facilities.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The superintendent authorizes the placement of the Electric, Plumbing, and Energy personnel under the supervision of the director of Support Services.	May 1998
2	The assistant superintendent of Support Services formalizes the proposed reorganization.	June 1998

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

SISD does not have a design development and construction standards handbook. Such handbooks outline the district's preferred configuration for elementary, middle, and high school grades and provide design standards, such as elevations and drainage requirements and the types of equipment, materials, and systems preferred by the district. The handbook also stipulates the district's minimum space standards for classrooms and common areas such as cafeterias and libraries.

Although Support Services is responsible for maintaining the district's facilities, its' personnel have had very little direct input into the design process or the selection of materials or systems for new facilities. Outside architects and engineers and the director of Facilities selected the types of materials and systems for each new facility and the manufacturers without consulting the department of Support Services on their reliability or durability. For example, the cooling system at Americas High, completed in 1997, repeatedly breaks down, and the roof at Montwood High, completed in 1990, frequently leaks. The lack of coordination between Facilities and Support Services also has prevented any standardization of building systems, requiring the district to stock more supplies and materials than would be needed in a more efficient system.

Many districts evaluate building materials and systems using life-cycle costing. Life-cycle costing considers not only the initial purchase price of materials and systems, but also the cost of operating them over their useful lives. Without life-cycle costing to evaluate materials and systems, districts tend to sacrifice operational efficiency to gain a lower initial purchase price for materials and systems.

Many SISD classrooms do not meet the state's minimum space standards of 30 square feet per student for elementary schools and 28 square feet per student for secondary schools (**Exhibit 5-5**).

Exhibit 5-5

State of Texas Minimum Space Standards for School Buildings

Type of Space	Level	Required Square Footage
General Classrooms	PreK through First Grade	36 square foot per student
	Elementary	30 square foot per student (700 minimum)
	Secondary	28 square foot per student (700 minimum)
Specialized Classrooms	Elementary	41 square foot per student

Computer Laboratories	Secondary	36 square foot per student
Science Lecture/Lab	Elementary	41 square foot per student
	Middle	50 square foot per student
	Senior	50 square foot per student
Physical Education Space	Elementary	3,000 square foot minimum
	Middle	4,800 square foot minimum
	Senior	7,500 square foot minimum
Libraries	Elementary	3 square foot per student (1,400 minimum)
	Middle	3 square foot per student (2,100 minimum)
	Secondary	3 square foot per student (2,800 minimum)

Source: Texas Education Code, Adopted amendments to Chapter 61, School Districts, Subchapter G, School Facility Standards, August, 1996

Although school facility guidelines call for 700 square feet for general classrooms, many school districts construct regular classrooms of either 840 or 900 square feet to enhance the learning environment and provide for the efficient use of instructional technology, manageable group instruction, and adequate storage.

All three school facilities examined by TSPR do not meet the state's minimum space requirements (**Exhibit 5-6**).

Exhibit 5-6

Classroom Size

Selected Schools

School	Classroom Square Feet	School Facility Guidelines	Number of Square Feet Above or (Below) Standard
Campestre Elementary	672	700	(28)
Sanchez Middle	624	700	(76)

Socorro High	672	700	(28)
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Source: SPACE, Inc.

Other districts such as United ISD have developed space use guidelines that specify not only the most appropriate size of classrooms to meet district needs, but also of libraries, cafeterias, offices and gymnasiums. These guidelines help ensure that the design of new schools or additions to existing schools are efficient.

Recommendation 40:

Develop a design development and construction standards handbook using life-cycle costing analysis.

The district should evaluate building materials and systems currently in use by other districts like United ISD and compile the handbook. Life-cycle costing should be used for all construction projects and equipment.

The district should incorporate the results of this evaluation as well as space use guidelines into its design development and construction standards handbook. The handbook should be developed in an electronic format to facilitate future updates and changes.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent of Support Services, with the assistance of the directors of Facilities and Support Services and the facility assessment contractor called for in the first recommendation in this chapter, develops a design development and construction standards handbook.	September 1998
2	The assistant superintendent of Support Services circulates the handbook to key individuals in the district and the community for feedback and revision.	December 1998
3	The superintendent and Board of Trustees approve the recommended handbook.	January 1999

FISCAL IMPACT

The development of an electronic design development and construction standards handbook for building materials and systems can be accomplished with existing staff and the contractor services called for in the first recommendation of this chapter.

Chapter 5

FACILITIES USE

CURRENT SITUATION

SISD instituted YRE in 1993. The district operates a 60-20 multitrack system with up to four tracks. In a 60-20 system, students attend school for three 60-day sessions that are separated by 20-day "intersessions" or vacations. Under a four track system, the district operates four school calendars at one school. As a result, schools can be occupied for 234 days rather than 175 days as with traditional operating calendar.

SISD has implemented the four-track system at six of its 23 schools. All of the district's high schools and three of its elementary schools operate on a single track. The rest of the schools operate on two tracks except for Vista del Sol, which operates on three tracks. With more overall teachers in the district than classrooms and a student-teacher ratio of 15.1 to one, SISD has adequate capacity for the next couple of years under its current system (Exhibit 5-7).

Exhibit 5-7

School Capacity Under Current System

September 1997

School	Enrollment	Teachers	Classrooms	Percent of Teachers with Classrooms	Student Teacher Ratio	Single Track Enrollment	Number of Tracks / Multi Track Enrollment
High School							
Americas	1,275	105	128	82%	12.1:1	2,580	1 / 2,580
Montwood	2,463	160	144	111%	15.4:1	2,580	1 / 2,580
Socorro	2,269	176	132	133%	12.8:1	2,580	1 / 2,580
KEYS Academy	82	16	10	160%	5.1:1	200	1./200
Middle School							
Clarke	1,067	78	49	159%	13.6:1	840*	4 / 1,120
Montwood	837	55	52	106%	15.2:1	800*	2 / 1,065

Sanchez	1,026	62	49	127%	16.5:1	840*	2 / 1,120
Slider	935	64	49	131%	14.6:1	840*	2 / 1,120
Socorro	904	64	44	145%	14.1:1	840*	4 / 1,120
Elementary School							
Martinez	1,015	56	50	112%	18.1:1	920*	4 / 1,226
Ball	1,083	52	45	116%	20.8:1	880*	4 / 1,173
Campestre	761	48	42	114%	15.8:1	680*	2 / 906
Chavez	807	40	50	80%	20.2:1	960	2 / 1,308
Cooper	853	50	41	122%	17.1:1	840*	4 / 1,120
Escontrias Pre-K	628	36	32	113%	17.4:1	580*	2 / 746
Escontrias	688	42	42	100%	16.4:1	840	2 / 1,120
Hilley	683	46	38	121%	14.8:1	720	1 / 960
Horizon	857	49	33	148%	17.5:1	680*	1 / 906
Hueco	495	34	34	100%	14.6:1	680	1 / 906
O'Shea	930	56	45	124%	16.6:1	840*	2 / 1,120
Rojas	861	52	42	124%	16.6:1	840*	2 / 1,120
Vista Del Sol	892	52	42	124%	17.2:1	1,000	3 / 1,333
Sierra Vista	707	55	50	110%	12.8:1	900	4 / 1,120
Other	--	21	-	-		-	
Total	22,118	1,469	1,243	118%	15.1:1	23,460	28,549

* Enrollment exceeds single-track capacity.

Source: Office of Support Services SISD.

FINDING

In all, SISD has been successful in maximizing the use of its facilities. Multitrack YRE has allowed some schools to avoid overcrowding. For example, Clarke Middle School, with a current enrollment of 1,067, has a single-track capacity of 840 and a multitrack capacity of 1,120.

TSPR found that the condition of SISD's facilities is excellent. During its on-site review, the review team evaluated three school facilities using an appraisal instrument developed by the Council of Educational Facility Planners International (CEFPI); the instrument uses a rating scale of 100 to 1,000, with 1,000 being the best. The factors evaluated include school site, structural and mechanical features, plant maintainability, school building safety and security, educational adequacy, and environment for education. Using this scale, TSPR evaluated Campestre Elementary, Sanchez Middle School, and Socorro High. Campestre, built in 1982, achieved a point total of 894; Sanchez Middle School, built in 1990, scored 867; and Socorro High School, built in 1971, scored 938. All three scores reflect an excellent rating.

SISD has 1,175 regular permanent classrooms and 68 transportable/temporary classrooms for a total of 1,243 regular classrooms. Transportable-temporary classrooms make up only 5 percent of the total (**Exhibit 5-8**).

Exhibit 5-8

Permanent and Portable Facilities

1997

		Classrooms			Percent of Portable Classrooms
Facility	Enrollment	Permanent	Portable	Total	
High School					
Americas	1,275	128	-	128	0%
Montwood	2,463	131	13	144	9%
Socorro	2,269	128	4	132	3%
K.E.Y.S. Academy	82	10	-	10	0%
Middle School					
Clarke	1,067	45	4	49	8%
Montwood	837	46	6	52	12%
Sanchez	1,026	42	7	49	14%

Slider	935	42	7	49	14%
Socorro	904	42	2	44	5%
Elementary School					
Martinez	1,015	42	8	50	16%
Ball	1,083	45	-	45	0%
Campestre	761	42	-	42	0%
Chavez	807	50	-	50	0%
Cooper	853	41	-	41	0%
Escontrias PreK	628	30	2	32	6%
Escontrias	688	42	-	42	0%
Hilley	683	36	2	38	5%
Horizon	857	31	2	33	6%
Hueco	495	34	-	34	0%
O'Shea	930	42	3	45	7%
Rojas	861	42	-	42	0%
Vista Del Sol	892	42	-	42	0%
Sierra Vista	707	42	8	50	16%
Total	22,118	1,175	68	1,243	5%

Source: Department of Support Services, SISD

SISD's permanent facilities encompass more than 2.8 million square feet. Transportable-temporary classroom buildings account for 67,000 square feet of that total, or 2.3 percent of the district's total floor space. This percentage is well below the generally accepted limit of up to 10 percent of students housed in transportable-temporary buildings.

COMMENDATION

SISD facilities are in excellent overall condition, while YRE has maximized facilities use and minimized its need for portable buildings.

FINDING

SISD works well with other public entities to enhance its facilities for its students and the community. SISD has entered into interlocal agreements with the cities of El Paso and Horizon as well as the Army Corps of Engineers on land development and facility improvements (**Exhibit 5-9**).

Exhibit 5-9

Interlocal Agreements

SISD With Other Local Public Entities

Project	School	Public Entity
Tennis and basketball courts	Montwood High	City of El Paso
Tennis courts and park	Clarke Middle	City of El Paso
Baseball fields and water retention project	Horizon Elementary	Army Corps of Engineers and City of Horizon

Source: Department of Support Services, SISD

SISD made an agreement with the City of El Paso to construct tennis courts and a park at Clarke Middle School and tennis and basketball courts at Montwood High School and to open them to the general public after school hours. In return, the City of El Paso agreed to maintain these facilities and pay for their operating costs. SISD also agreed to provide land at Horizon Elementary School to the Army Corps of Engineers for a water retention project. The City of Horizon used the same land for a baseball field that is used by both the community and the district. These projects have benefited both SISD and the community by providing

greater access to recreational facilities while reducing costs for the district. Although SISD constructed the Aquatics Center without partners, it does provide a recreational outlet for area residents.

COMMENDATION

SISD is stretching its financial resources by using interlocal agreements with local governments to provide recreational facilities for students and the community.

FINDING

Although YRE has helped SISD to maximize the use of its space, enrollment projections show that some schools will exceed their capacity within the next three years. Montwood High School's enrollment already exceeds its capacity, while Helen Ball and Horizon, even under four-track YRE, will exceed their capacity in the next three years. Hueco Elementary, on the other hand, has an enrollment of just 495 students in a facility with a capacity of 680 (**Exhibit 5-10**).

Exhibit 5-10

1997 Student Capacity and Enrollment

School	Tracks	Capacity		Present Enrollment	Projected Enrollment		
		Single Track	Multi Track		1998-99	1999-2000	2000-01
High School							
Americas	1	2,580	2,580	1,275	1,468	1,688	1,939
Montwood	1	2,580	2,580	2,463	2,709	2,980	3,278
Socorro	1	2,580	2,580	2,269	2,314	2,361	2,408
K.E.Y.S. Academy	1	200	200	82	-	-	-
Middle School							
Clarke	4	840	1,120	1,067	1,174	1,291	1,420
Montwood	2	800	1,065	837	983	1,107	1,273
Sanchez	2	840	1,120	1,026	1,077	1,131	1,188
Slider	2	840	1,120	935	962	1,031	1,082
Socorro	4	840	1,120	904	949	997	1,046

Elementary School							
Martinez	4	920	1,226	1,015	1,065	1,119	1,175
Helen Ball	4	880	1,173	1,083	1,191	1,310	1,441
Campestre	2	680	906	761	799	839	881
Chavez	2	960	1,308	807	928	1,067	1,227
Cooper	4	840	1,120	853	895	940	987
Escontrias EEC	2	580	746	628	659	692	727
Escontrias	2	840	1,120	688	722	759	798
Hilley	1	720	960	683	717	753	791
Horizon	1	680	906	857	943	1,037	1,141
Hueco	1	680	906	495	505	515	525
O'Shea	2	840	1,120	930	977	1,025	1,077
Rojas	2	840	1,120	861	904	949	997
Vista Del Sol	3	1,000	1,333	707	742	779	818
Sierra Vista	4	900	1,120	892	937	983	1,033
Total		23,460	28,549	22,118	23,620	25,353	27,252

Source: Department of Support Services, SISD

SISD procedures for establishing or changing attendance boundaries are as follows:

- Administration reviews enrollment figures and determines need for boundary changes on a yearly basis.
- Administration meets with Student Advisory Council and Parent Communication Council to obtain input on proposed changes.
- Administration presents proposed changes to the Student/Administration Committee for review.
- Administration presents proposed changes to the community during scheduled meetings of parent-teacher associations and organizations or at a special community meeting.

- Administration presents final proposal for boundary changes to Student/Administration Committee for approval.
- Administration presents final proposal to the Board of Trustees for Approval.

Part of the mission of the Blueprint for the Twenty-first Century Committee is to design attendance zones to "gain the greatest student enrollment capacity in existing and future school buildings."

Other school districts have held public hearings, including key business and civic leaders and the public at large, to gather input and garner support for the attendance boundary review process.

Recommendation 41:

Review and amend attendance zone boundaries.

As part of its development of a facilities master plan, SISD should review attendance zone boundaries using public hearings and an analysis of current facilities and projected enrollment growth. Attendance zone boundaries should be changed as needed to ensure full use of current facilities, reduce overcrowding, and incorporate new facilities as they are completed.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The Blueprint for the Twenty-first Century Committee recommends revisions in attendance zone boundaries based on enrollment projections and other criteria addressed during the facilities master planning process.	November 1998
2	The superintendent and board approve, after any necessary changes, recommended revisions to attendance zone boundaries in the completed facilities master plan.	January 1999
3	The assistant superintendent of Administration revises attendance zone boundaries for the next school year.	March 1999

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

SISD does not have an Americans with Disabilities Act (ADA) compliance plan. Although its newly constructed facilities constructed are in full compliance, the district does not have any plan to bring older facilities up to ADA standards. The act does not require the renovation of every existing building, but when existing buildings are renovated, they must be brought to ADA standards. **Exhibit 5-11** provides a list of required ADA renovations identified during the review team's evaluation of three of the district's oldest schools.

Exhibit 5-11

Deficiencies in ADA Compliance

Selected SISD Schools

Campestre Elementary School
<ul style="list-style-type: none"> ○ Remodel restrooms and drinking fountains. ○ Install ramp to freezer and refrigerator in kitchen. ○ Replace all door knobs and faucet knobs with level handles. ○ Replace door signage with appropriate wall graphics. ○ Install strobe lights.
Sanchez Middle School
<ul style="list-style-type: none"> ○ Recess electric water coolers. ○ Replace all door knobs and faucet knobs with level handles. ○ Replace door signage with appropriate wall graphics. ○ Install strobe lights.
Socorro High School
<ul style="list-style-type: none"> ○ Recess electric water coolers. ○ Replace all door knobs and faucet knobs with level handles. ○ Replace door signage with appropriate wall graphics. ○ Install strobe lights.

Source: Neal & Gibson

SISD acknowledges its "need to work on ADA compliance" at Socorro High School in its proposed capital improvements for 1997-98 (Appendix

G), but does not have an ADA compliance plan to ensure that future renovations include ADA issues.

Although the district is not in violation of any federal law, SISD is open to potential lawsuits for limited-access facilities. Since January 26, 1995, ADA complaints can be filed with the federal government. Any individual can file a private lawsuit under the act that charges that the district has failed to develop a plan to make its facilities fully accessible to people with disabilities.

Recommendation 42:

Develop an ADA compliance plan.

The independent consultant hired by the Blueprint for the Twenty First Century Committee to develop a facilities master plan for the district should complete an ADA evaluation of all facilities as part of the facilities assessment process. The evaluation should identify deficiencies and develop a plan that includes the types of renovations outlined in Exhibit 5-11 in compliance with ADA requirements.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The consultant for the facilities master plan should identify needed improvements to comply with ADA requirements as part of the district's facilities assessment process.	October 1998
2	The director of Facilities and director of Finance develop a financial impact plan for facility modifications.	November 1998

FISCAL IMPACT

The identification of facilities that are not in compliance with ADA will be accomplished as part of the facilities assessment process in the development of a facilities master plan. No additional resources will be needed to prepare an ADA compliance plan.

FINDING

Many construction materials manufactured from the 1940s to the 1970s contained asbestos. Following research indicating that asbestos poses a health risk, the federal "Asbestos Hazard Emergency Response Act" (AHERA) was passed effective October 12, 1988. It requires either the abatement (removal) of asbestos-containing materials or inspection of

these materials every three years by a licensed inspector. This inspection ensures that damage has not occurred to materials containing asbestos that would release asbestos particles into the air. AHERA also requires all new school district custodial and maintenance employees to receive additional training regarding asbestos safety within 30 days after employment. The ongoing inspections and training are required until abatement occurs. AHERA also requires annual notifications concerning the presence of asbestos to staff, students, and parents. Without strict compliance with these federal regulations, school districts can be fined up to \$10,000 a day.

Samples tested on February 25, 1993 by Applied Environment Services indicated that the Escontrias Early Childhood Center had ceiling tiles containing asbestos building materials. According to district records, these tiles were removed in October 1993. In addition, portables at six schools were reported to have floor tile mastic containing asbestos. These facilities include Horizon Heights, Martinez and Vista Del Sol Elementary Schools, Slider and Socorro Middle Schools, and Socorro High School. According to the district personnel, SISD contained this problem by carpeting the portables. Since it still has materials with asbestos in its facilities, however, the district must complete a three-year update inspection as required by AHERA.

Recommendation 43:

Contract with a licensed inspector to complete a three-year update asbestos inspection as required by federal law.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The director of Support Services works with the district's purchasing agent to develop a request for proposals for an asbestos inspection.	April 1998
2	The director of Support Services and purchasing agent review the submitted proposals.	May 1998
3	The director of Support Services and purchasing agent select the company submitting the best proposal.	June 1998
4	The contracted company completes a three-year update inspection or as required by AHERA.	July 1998

FISCAL IMPACT

The cost of the inspection is estimated at \$1,000 per facility or a total of \$7,000.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Contract with inspector to complete an asbestos inspection.	(\$7,000)	\$0	\$0	(\$7,000)	\$0

Chapter 5

CONSTRUCTION MANAGEMENT

BACKGROUND

To accommodate its rapid enrollment growth, SISD has built 11 new schools since 1990 (**Exhibit 5-12**).

Exhibit 5-12

History of School Construction

Facility	Year of Construction	Year of Additions
Escontrias ECC	1921	1991
Socorro High	1971	1971, 1975, 1977, 1986, 1988
Keys Academy	1973	1994, 1996
Hilley Elementary	1980	1986
Campestre Elementary	1982	1986, 1992
Horizon Elementary	1983	1985, 1988
Hueco Elementary	1983	1993
Vista Del Sol Elementary	1983	1985, 1989
Escontrias Elementary	1986	1992
O'Shea Elementary	1986	1989
Cooper Elementary	1987	1991
Rojas Elementary	1987	1989
Montwood High	1990	None
Sanchez Middle	1990	None
Socorro Middle	1990	1994
Slider Middle	1991	1994
Martinez Elementary	1991	None
Clarke Middle	1993	None
Sierra Vista	1993	None

Ball Elementary	1995	None
Americas High	1996	None
Montwood Middle	1997	None
Chavez Elementary	1997	None

Source: Office of Support Services SISD

SISD also has completed a new facility for its central administration (Education Center, 1985), a stadium complex (Student Activities Complex, 1992), purchased and renovated the support services complex (Support Services Center, 1993), and built the Aquatics Center (Regional Recreational Education Center, 1997).

SISD's taxpayers approved the district's most recent bond issue in 1995. The issue was worth \$70 million and funded the projects listed in **Exhibit 5-13**.

Exhibit 5-13

Estimated Cost and Status of Construction Projects

1995 Bond Fund

Project	Estimated Cost	Funding Source	Construction Start	Status
Americas High School	\$24,000,000	Bond Fund	July 1996 July 1997	Completed
Montwood Middle / Chavez Elementary	\$14,000,000	Bond Fund	July 1997 Dec 1997	Completed
Horizon Middle	\$9,800,000	Bond Fund	June 1998	Planning
Middle School	\$7,500,000	Bond Fund	June 1998	Planning
Middle School	\$7,500,000	Bond Fund	June 1998	Planning
Technology	\$4,500,000	Bond Fund	July 1998	Planning
Other	\$2,200,000	Bond Fund	1996-1999	Planning

Contingency	\$500,000	Bond Fund	-	-
Total Bond Issue	\$70,000,000	Bond Fund		
Aquatics Center	\$3,000,000	Operating Fund	July 1997	Completed

Source: Department of Finance, SISD

CURRENT SITUATION

The Texas Education Code allows school districts to manage construction projects by any of six methods, which are outlined by TEA's *Project Delivery for Texas Public Schools, 1997*. These six methods are competitive bidding, competitive sealed proposals, construction management at risk, construction management-agency, design/build, and bridging. These six methods differ in three principal ways: the number of contracts held by a district, the type and extent of assistance provided by the builder in the design phase, and the level of district participation in subcontract awards.

In the competitive bidding and competitive sealed proposal methods, the district selects an architectural/engineering firm to design the project and a general contractor to perform the work. Both the architectural/engineering firm and the general contractor report directly to the district. The advantages of general contracting include open, aggressive bid competition, a defined project scope, up-front knowledge of construction costs, and a central point of control. The design-build method, although common in the private sector, is typically not used in the public sector due to the loss of checks and balances and the level of expertise required to manage the business relationships involved.

Many districts, including SISD, are using the construction management method because it provides more flexibility in the selection process and greater assistance with facilities design.

Under construction management, the district selects the architectural/engineering firm and one of two types of construction managers: a construction manager-agency or a construction manager at risk. The construction manager-agency serves as the district's agent, providing administrative and managerial services in place of a general contractor; the construction manager at risk serves as the general contractor and assumes the risk for construction. Firms serving as construction managers are selected under the request for proposals provisions of the Texas Education Code.

The district's most recently completed facilities are Americas High School, the Aquatics Center, and the Chavez Elementary / Montwood Middle School. Two architectural/engineering firms, Moore Nordell Kroeger and The Mijares Group Inc., managed these projects. The types of construction management used in building these facilities are summarized in **Exhibit 5-14**.

Exhibit 5-14

Types of Construction Management Used by SISD

For its Last Three Facility Projects

Project	Firm	Type of Construction Management
Americas High	Silverton Construction Company	General contractor
Aquatics Center	Gilbane Building Co.	Construction management - at-risk
Chavez Elementary / Montwood Middle	Gilbane Building Co.	Construction management - at risk

Source: Project Contracts, Department of Support Services and Department of Administration, SISD

FINDING

In June 1997, the Texas Legislature authorized the state to pay portions of the debt service used to build qualified school facilities under the Instructional Facilities Allotment (IFA) program. This law equalizes the burden of debt service for financing school construction and is available to all districts legally authorized to enter into debt or leases. On January 21, 1998, the Texas Education Agency notified SISD that its application had been approved contingent upon the receipt of some additional information and the actual sale of bonds. The funds will be available to the district after its sale of \$25 million authorized but unissued bonds beginning next fiscal year. The subsidy is estimated at 71.6 percent of the annual debt service requirements for the full term of the debt. SISD's estimated state subsidy for the first year, 1998-99, is approximately \$1.3 million.

COMMENDATION

SISD has applied for and received additional state funding to assist with the construction and renovation of its facilities.

FINDING

Bidding for major construction projects is managed by the Facilities Department without advice or support from the Finance or Purchasing Departments or approval and sign off by the superintendent. The director of Purchasing has not been involved in some of the district's largest purchasing decisions, specifically those decisions involving the district's multi-million-dollar construction contracts. The closed evaluation process could lead to irregularities in the procurement process at the district in the future.

SISD has recently investigated at least two complaints concerning alleged impropriety on the part of a Support Services staff member, including violations of district purchasing policies and procedures. Disciplinary proceedings are pending against another staff member. Although the district intends to review its purchasing practices and procedures to prevent future violations, policy and procedure changes have not yet been put in place.

Recommendation 44:

The Purchasing Department should oversee the bidding and selection process for construction and renovation projects.

The Facilities Department should establish specifications for major construction and renovation projects, but Purchasing should oversee the bidding and selection process. The superintendent should sign off on recommended projects that are submitted to the board for approval.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The assistant superintendent of Human Resources writes and implements policies and procedures for Purchasing to oversee the bidding and selection of construction and renovation projects.	May 1998
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FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

In prioritizing capital improvement requests, Support Services follows a number of procedures. Before the budget process is initiated, all principals are asked to submit a list of major projects that need to be performed on their campuses. Principals are asked to list the projects in the order of priority. All Support Services Departments are also required to submit a list of major projects that have come to their attention during the previous year.

All projects are then further prioritized by Support Services personnel taking into consideration such factors as safety, comfort, impact on the educational process, and esthetics. During the budgeting process the projects are assigned to the different accounts such as contracted services, supplies and materials (for in-house performance), and major improvements.

Budgeted projects are then initiated. In the event of a budget cut, Support Services personnel with input from principals again prioritize the major project list to determine which projects can be accomplished during the budget year.

The department of Support Services completed the following capital improvements in 1996-97 (**Exhibit 5-15**).

Exhibit 5-15

Capital Improvement Projects

1996-97 School Year

Description	Amount
Asphalt paving projects at Socorro High School and Campestre and Hueco Elementary Schools	\$364,000
Electrical upgrades - eight facilities	\$ 869,222
Total	\$ 1,233,222

Source: Department of Support Services, SISD

Support Services submitted an itemized list of proposed capital improvements for 1997-98 to the board without associated costs for each project (Appendix G). Without these associated costs, it is difficult for

district management and the Board of Trustees to evaluate the cost and benefits of these projects. By the time of this report, the director of Support Services developed cost estimates for proposed capital improvements for 1997-98, although the list of proposed improvements had not been prioritized.

Recommendation 45:

Develop a priority list of proposed capital improvements with cost estimates for each.

These estimates would allow district management and the board to better weigh the cost and benefits of capital improvement projects. The prioritized list should be submitted to the board at least annually.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The director of Support Services develops cost estimates for proposed capital improvement projects.	Completed
2	The director of Facilities prioritizes the list of the proposed capital improvement projects and submits the list to the administrative team for review and comment.	June 1998
3	The director of Facilities submits the final list, with cost estimates to the board for consideration.	July 1998

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

The American Institute of Architects (AIA) has developed model architectural/engineering and construction contracts for its membership. Although these contracts are developed for and consequently biased toward the construction industry, many school districts adapt them for their own use. Other districts develop their own contracts. However, unlike an adapted AIA contract, many of the clauses in these contracts have not been tested by the courts.

Several years ago, SISD abandoned its adapted AIA contract and adopted a construction contract used by Ysleta ISD. At the time of this review, the

district's attorney did not realize that the district was using this contract and had not reviewed it.

The industry is accustomed to using the AIA contract. Deviation from the use of that contract can be confusing for the district and the vendors.

Recommendation 46:

Adapt the AIA architectural/engineering and construction contracts for future facility projects.

Adapting the AIA model will eliminate confusion and limit the potential for legal problems. However, should the district want to keep its current contracts, it should submit them to in-house legal counsel to ensure that all the elements in the AIA model are in place.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The superintendent approves the use of the AIA model architectural/engineering construction contracts for the district.	May 1998
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FISCAL IMPACT

This recommendation can be accomplished with existing resources.

Chapter 5

MAINTENANCE OPERATIONS

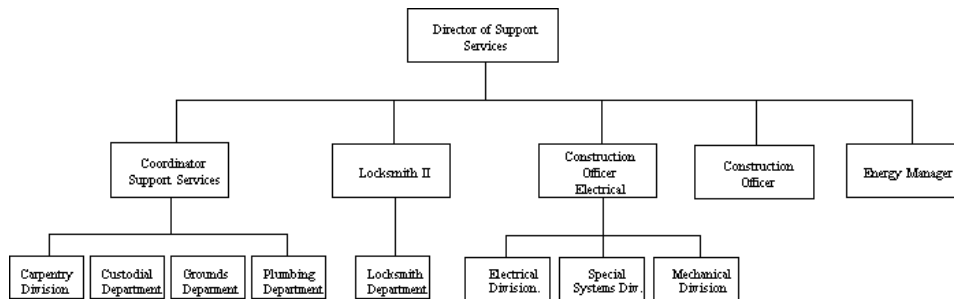
CURRENT SITUATION

The Department of Support Services has 125 full-time employees with eight managers, eight clerical workers, 42 craftsmen, 16 helpers, 22 grounds, 17 warehousemen and 12 paraprofessionals (Exhibit 5-16).

Exhibit 5-16

Organization

Department of Support Services



Source: Department of Support Services, SISD

Support Services is responsible for plant maintenance for all SISD facilities, grounds, and equipment. These include 23 school facilities and five support facilities encompassing 322 acres of land and 2.9 million square feet of buildings.

FINDING

Before 1993, SISD housed its warehouse operation and support services functions, including food services, maintenance, facilities, and printing, in an old elementary school built in 1973. The elementary school was poorly designed for these purposes.

In 1993, SISD purchased a vacated manufacturing facility located in the southern part of the district for \$875,000. This is well below an estimated market value of \$20 per square foot for the region. This facility includes 43 acres of land and a building with about 188,000 square feet of floor space. SISD renovated the facility and it now houses the district's

maintenance, custodial, grounds, food services, security, warehousing, printing and mail services.

COMMENDATION

SISD purchased and renovated a vacated manufacturing facility to serve as its support services center at a cost much lower than the cost of building a similar center.

FINDING

Most aspects of SISD's facilities functions compare favorably with its peer school districts. SISD has fewer maintenance supervisors than Laredo, Edinburg, and Pharr-San Juan-Alamo ISDs and fewer overall facilities personnel than Laredo (**Exhibit 5-17**).

Exhibit 5-17

Comparison Data from Peer School Districts

	School District			
Subject	Edinburg	Laredo	Pharr-San Juan-Alamo	Socorro
Size Characteristics				
Student Enrollment	18,828	21,244	21,430	22,118
Facility Square Footage	2,482,000	2,160,790	2,079,948	2,900,786
Number of Acres	580	189	639	322
Operating Expense				
Maintenance Personnel Cost	\$1,398,592	\$ 2,552,748	\$2,036,251	\$ 2,284,526
Contract Services Cost	\$ 434,650	\$ 326,305	\$ 64,800	\$ 1,588,359
Maintenance Materials Cost	\$1,255,100	\$ 466,587	\$ 488,700	\$ 1,045,289
Total Dollars Function 51	-	\$ 3,345,640	\$2,586,751	\$ 4,918,174
Personnel				

Number of Maintenance Supervisors	10	9	10	8
Total Number Facilities Personnel	84	130	99	125

Source: Department of Support Services, SISD and selected peer districts

According to industry experts, the standard formula for determining the appropriate number of mechanics or technicians for a facility ranges from 40,000 square feet per skilled craftsman for old facilities to 60,000 square feet for new facilities. By the 60,000-square-foot yardstick, SISD could justify having 48 skilled maintenance workers, but only employs 42. SISD also has the lowest student-to-maintenance employee ratio among its peer districts (**Exhibit 5-18**).

Exhibit 5-18

Maintenance Employees at SISD and Peer School Districts

Occupation	School District					
	El Paso	Ysleta	Socorro	Pharr-San Juan-Alamo	Laredo	Edinburg
Carpenters	10	3	12	14	4	6
Electricians	8	6	9	7	5	4
Plumbers	6	4	8	6	5	3
HVAC Tech.	16	13	5	11	8	8
Painters	19	2	1	11	4	4
Glaziers	2	5	0	0	1	0
Masons	2	4	1	0	2	3

Roofers	2	3	1	5	1	2
Hardware Repairmen	3	7	2	1	2	1
Welders	2	6	2	3	2	2
Sheet metal	0	6	0	0	0	0
Mechanics	19	13	1	4	2	2
Subtotal	89	72	42	62	36	35
Grounds Personnel	19	43	22	18	7	21
Helpers/Laborers	79	25	17	5	27	19
Pest Control	0	0	1	-	1	-
Warehouse Personnel	38	0	17	5	13	7
Food Service Repairmen	-	0	1	-	2	-
Other	40	24	9	-	-	-
Total	265	164	109	90	86	82
Enrollment	64,444	47,366	22,118	21,430	21,244	18,828
Student-to- Maintenance Employee Ratio	243:1	289:1	203:1	238:1	247:1	238:1

Source: Department of Support Services, SISD and selected peer districts

According to a TSPR survey, 83 percent of the district's teachers and principals agree that its facilities are well-maintained, while only 7 percent disagree. These results reveal that Support Services' customers are pleased with the quality of the department's work.

COMMENDATION

The Support Services Department performs maintenance operations with relatively few staff members given its size, and meets or exceeds the expectations of its customers.

FINDING

Support Services received 4,277 work orders in the 1996-97 school year. The department is piloting an electronic maintenance work order system in three schools that tracks labor and materials costs per work order. The Support Services work-order clerk receives each work order on-line from the three schools. A work order is printed for the director to accept or reject. If accepted, it is given to the appropriate craft supervisor. Supervisors prioritize their work orders and give their employees a hard copy of the order.

Department craftsmen submit the pre-numbered work order to receive materials from the warehouse. When a project is completed, the labor hours expended and the cost of materials are entered into the computer and the work order is closed. The director of Support Services receives a monthly printout of work orders received and closed.

This system reduces the amount of paperwork performed by maintenance staff, freeing them to perform actual maintenance work and allows management to track material and labor costs by project.

COMMENDATION

SISD is implementing an electronic maintenance work order system that will further increase Support Services' efficiency.

FINDING

A preventive maintenance program is designed to extend the life of school facilities and ensure that they operate at optimum efficiency and that potentially costly repairs to facilities and equipment are identified early. SISD's schedule of preventive maintenance includes the following tasks:

- air conditioning and heating system cleaning
- adjusting and testing
- cleaning of plumbing drains and roof drainage systems
- cleaning and inspection of interior and exterior lighting
- cleaning and inspection of interior and exterior finishes
- bleacher maintenance
- inspection and testing of public address system
- security and fire alarm systems

Support Services conducts preventive maintenance through two teams, each of which consists of four craftsmen who perform preventive maintenance on each facility in the district twice a year. The preventive maintenance schedule for the 1997-98 school year is detailed in **Exhibit 5-19**.

Exhibit 5-19

Preventive Maintenance Schedule for 1997-98

Equipment/Component	Location	Work Performed	Frequency
Air Handling Units	Systemwide	Change Filters	Every 90 days, beginning June 1
Circulator Pump(s)	Systemwide	Inspect and oil motor	Annually, beginning June 1
Condensing Units	Systemwide	Clean unit	Annually, beginning June 1
Coolers and Freezers	Systemwide	Clean condenser and visually inspect	Annually, beginning June 1
Cooling Tower	Systemwide	Clean tower and oil motor	Annually, beginning June 1
Domestic Water Heater (Electric)	Systemwide	Visual inspection	Annually, Beginning June 1
Domestic Water Heater (Gas)	Systemwide	Visual inspection	Annually, Beginning June 1
Electrical General Building Inspection	Systemwide	Visual inspection	Annually, Beginning June 1
Exhaust Fan(s)	Systemwide (Restrooms)	Visual inspection	Annually, Beginning June 1

Filter Replacement Inspection	Systemwide	Change out filters	Every 90 days, beginning June 1
Gas Fired Steam Boiler	Systemwide	Visual inspection	Annually, Beginning June 1
Gas Fired Water Boiler	Systemwide	Visual inspection	Annually, Beginning June 1
General Building Exterior Inspection	Systemwide	Visual inspection	Annually, Beginning June 1
General Building Interior Inspection	Systemwide	Visual inspection	Annually, Beginning June 1
General HVAC Inspection	Systemwide	Visual inspection	Annually, Beginning June 1
Ice Machine(s)	Systemwide	Clean and inspect visually	Annually, Beginning June 1
Kitchen Appliances	Systemwide (Cafeteria)	Clean and inspect visually	Annually, Beginning June 1
Milk Boxes	Systemwide	Clean and inspect visually	Annually, Beginning June 1
Painting Inspection	Systemwide	Visual inspection	Annually, Beginning June 1
Plumbing Inspection	Systemwide	Visual inspection	Annually, Beginning June 1
Roofs	Systemwide	Visual inspection	Annually, Beginning June 1
Steam Traps & Steam Mains	Pine Street	Visual inspection	Annually, Beginning

			June 1
Unit Heater/Ventilator (Electrical)	Systemwide	Visual inspection	Annually, Beginning June 1
Unit Heater/Ventilator (Gas)	Systemwide	Visual inspection	Annually, Beginning June 1
Water Coolers	Systemwide	Visual inspection	Annually, Beginning June 1
Window Air Conditioners	Systemwide	Visual inspection	Annually, Beginning June 1

Source: Department of Support Services, SISD

Although the department of Support Services develops a detailed schedule of preventive maintenance, it does not have a means of determining the amount of resources dedicated to this function. Preventive maintenance jobs are not logged into the department's work-order system, which makes it impossible to track the cost of these jobs.

Recommendation 47:

Track preventive maintenance jobs through the existing work-order system.

The Department of Support Services should develop work orders for preventive maintenance jobs by trade so that labor and material costs can be obtained for each job to determine its effectiveness. The department should use its existing work-order system to track preventive maintenance jobs.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The director of Support Services develops and institutes the appropriate procedures to track preventive maintenance projects for labor and materials.	May 1998
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FISCAL IMPACT

The recommendation can be accomplished with existing resources.

Chapter 5

CUSTODIAL SERVICES

CURRENT SITUATION

SISD employs 152 full-time custodians. Two years ago, the responsibility for managing custodial personnel was transferred from the department of Support Services to each facility. Employees in Food Service clean the kitchens and cafeterias daily. These tasks include the cleaning table tops, sweeping and spot-cleaning the cafeteria floor, and removing waste. One of the coordinators in the Maintenance Department is responsible for custodial training and the evaluation of materials, supplies, and equipment.

FINDING

The coordinator uses a five-factor allocation formula developed by Ohio State University to determine the number of full-time custodial employees the district requires (**Exhibit 5-20**).

Exhibit 5-20

Formula for Determining Custodial Staffing

1. Given: One custodian for each 12 teachers, find teacher factor

$$\frac{\text{No. of teachers}}{12} = \text{Teacher factor}$$

2. Given: One custodian for each 250 pupils, find pupil factor

$$\frac{\text{No. of pupils}}{250} = \text{Pupil factor*}$$

3. Given: One custodian for every 12 classrooms,** find room factor

$$\frac{\text{No. of rooms}}{12} = \text{Room factor*}$$

12

4. Given: One custodian for every 20,000 sq. ft. of building area, find square foot factor

$\frac{\text{Total sq. ft. building}}{\text{factor}^*} = \text{Square footage}$

20,000

5. Given: One custodian for each two acres of grounds under their responsibility including hard-surface parking and playground areas, find grounds factor

$\frac{\text{Total acres grounds}}{\text{Grounds factor}^*}$

2

6. Add the five factors and divide total by 5 to find actual number of custodians needed

$\frac{\text{Total 5 Factors}}{\text{Custodians needed}^*}$

5

** Correct to two decimal places*

*** Classrooms include all adjacent rooms that are to be cleaned such as: offices, storage rooms, toilets and hallways. Large areas such as gymnasiums are equal to two classrooms.*

Source: Department of Support Services, SISD.

COMMENDATION

SISD's formula for custodial staffing provides efficient staffing levels at each facility.

FINDING

As part of its in-service training for head custodians, the Maintenance Department hires the Red Cross to train and certify the head custodian at each school in cardiopulmonary resuscitation (CPR). This provides better protection for SISD students and staff in the event of unforeseen health emergencies.

COMMENDATION

All head custodians in SISD have received training and certification in CPR, enhancing the safety of district students and staff.

FINDING

SISD's custodial cost per square foot is considerably lower than peer school districts surveyed by the review team. (**Exhibit 5-21**).

Exhibit 5-21

Custodial Personnel Costs

SISD Versus Selected Peer Districts

School District	Number of Custodians	Total Square Footage	Average Square Footage	Total Personnel Cost	Average Personnel Cost
Edinburg	146	2,482,000	17,000	-	-
El Paso	562	8,204,000	14,598	-	-
Laredo	312	2,160,790	7,061	\$ 4,707,285	\$ 15,087
Pharr	125	2,079,948	16,640	\$ 2,047,343	\$ 16,379
Socorro	152	2,900,786	17,847*	\$ 1,841,663	\$ 12,116

* Based on SISD's five-factor allocation formulaSource: Department of Support Services, SISD, and peer school districts

According to a 1996 study of school districts in Region VI in *American School and University* magazine, "the average (custodial) cost per square foot for Region VI is 86 cents." With 2.9 million square feet of facilities, SISD's appropriate level of custodial personnel cost would be about \$2.5 million. SISD's Finance Department reports the district's actual custodial personnel cost for 1996-97 was about \$1.8 million. This comparison reflects savings in custodial personnel costs of \$653,013 (**Exhibit 5-22**).

Exhibit 5-22

Number of Custodians by Work Shift

Facility	Number on Custodians on Day Shift	Number of Custodians on Evening Shift	Total Number of Custodians
High Schools			
Americas	4	8	12
Montwood	6	12	18
Socorro	10	11	21
Keys Academy	1	2	3
Middle Schools			
Clarke	3	3	6
Montwood	2	3	5
Sanchez	2	3	5
Slider	2	3	5
Socorro	1	4	5
Elementary Schools			
Ball	2	3	5
Campestre	2	2	4
Chavez	2	3	5
Cooper	2	2	4
Escontrias E.C.C.	2	2	4
Escontrias	1	3	4
Hilley	1	3	4
Horizon	2	2	4
Hueco	2	2	4
Martinez	2	3	5
O'Shea	2	3	5

Rojas	2	2	4
Sierra Vista	2	3	5
Vista del Sol	3	2	5
Support	5	5	10
Total	63	89	152

Source: Department of Support Services, SISD

SISD has the lowest custodial supplies and materials cost of its peer districts (**Exhibit 5-23**).

Exhibit 5-23

Custodial Supplies/Materials Cost

School District	Enrollment	Number of Custodians	Assigned Square Footage	Supplies Materials Cost	Cost Per Student	Cost Per Custodian
Edinburg	18,828	146	17,000	\$ 200,000	\$ 10.62	\$ 1,369.86
El Paso	64,205	562	14,598	\$ 528,800	\$ 8.23	\$ 939.50
Laredo	21,244	312	7,061	\$ 306,575	\$ 14.43	\$ 982.61
Pharr	21,430	125	16,640	\$ 250,000	\$ 11.66	\$ 2,000.00
Socorro	22,118	152	17,847	\$ 178,645	\$ 8.07	\$ 1,175.29
Average					\$ 10.60	

Source: Peer school districts

The cost for SISD's custodial supplies and materials is only \$8.07 per student, far lower than the average cost of \$10.60 for the peer districts.

SISD has been able to maintain low custodial costs by delegating responsibilities for cleaning cafeterias to food service employees, who

wipe down and store the tables at each school. Under this staffing arrangement, the district has eliminated the need for an additional custodian at each school.

COMMENDATION

SISD has successfully reduced its custodial costs by delegating responsibilities for cleaning cafeterias to Food Service employees.

Chapter 5

ENERGY MANAGEMENT

BACKGROUND

Energy costs have risen faster than the inflation rate over the past 20 years, making energy management a high priority for school districts. New state and federal regulations for clean air, the cost of nuclear power plants, and decreasing supplies of crude oil all have made electricity more costly.

CURRENT SITUATION

SISD uses the Fast Accounting System for Energy Reporting (FASER)/Baseline Cost Avoidance Energy Management System to analyze its utility consumption and cost. FASER is a software system developed by the Omni Corporation of State College, Pennsylvania. SISD also has installed a partial electronic energy management system called the METASYS Facility Management System manufactured by Johnson Controls Inc. The district intends to install this system in all district facilities.

Until this system is completely installed, SISD relies on time clocks to turn chillers, blowers, and boilers on or off.

The district has retrofitted lighting fixtures in six facilities, and an additional eight facility retrofits are planned. The district is financing these retrofit projects through operating funds.

FINDING

Energy experts estimate the appropriate level for school district energy costs per square foot at \$1 or less. Given this benchmark, SISD has relatively low energy costs of 77 cents per square foot. SISD's energy costs in the 1996-97 school year totaled \$2.2 million (**Exhibit 5-24**).

Exhibit 5-24

SISD Utility Costs, 1996-97 School Year

Category	Amount
Electric	\$ 1,553,291
Gas	272,447

Water & Sewer	406,918
Total	\$ 2,232,656

Source: Department of Finance, SISD

Given SISD's facility space of 2.9 million square feet and its annual energy cost of \$2.2 million, SISD uses 77 cents per square foot in energy. SISD has the lowest energy cost per square foot of any of the school districts surveyed by the review team (**Exhibit 5-25**).

Exhibit 5-25

Energy Costs

SISD Versus Selected Peer Districts

School District	Total Square Footage	Total Energy Cost	Cost per Square Foot
Laredo	2,160,790	\$ 2,444,392	\$ 1.13
El Paso	8,204,000	\$ 7,935,150	\$.97
Ysleta	6,976,795	\$ 6,072,813	\$.87
Socorro	2,900,786	\$ 2,232,637	\$.77

Source: Department of Support Services, SISD, and selected peer school districts

COMMENDATION

SISD has maintained low overall energy consumption through a diligent energy conservation program.

FINDING

Three of SISD's schools have relatively high energy costs. These schools are Montwood High, Helen Ball Elementary, and Sierra Vista Elementary (**Exhibit 5-26**).

Exhibit 5-26

Energy Cost by School

1996-97 School Year

Facility	Square footage	Energy Cost	Cost per Square Foot
Montwood High School	358,612	\$ 451,575	\$ 1.25
Helen Ball Elementary	85,600	\$ 95,897	\$ 1.12
Sierra Vista Elementary	77,764	\$ 138,281	\$ 1.78
District Average			\$ 0.77

Source: Department of Support Services, SISD

According to the district, higher energy costs at these three schools may be due to the fact that they host after-school functions more frequently than other schools.

Recommendation 48:

Conduct an energy audit at Montwood High, Helen Ball Elementary, and Sierra Vista Elementary to reduce energy costs at these schools.

The district should ask the General Services Commission's State Energy Conservation Office to conduct an energy audit on these schools. The energy audit should include an analysis of energy usage and should examine the schools' operational policies and the efficiency of their equipment. The audit also should identify the energy savings potential of these schools. If the reasons for their higher costs are not due to different operational policies, the district should consider retrofits of needed conservation equipment, using performance contracting to finance them.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The Department of Support Services establishes reasons for high energy costs at Montwood High, Helen Ball Elementary, and Sierra Vista Elementary.	April 1998
2	The department of Support Services reduces energy consumption at these schools.	August 1998

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

Chapter 6

FINANCIAL MANAGEMENT

This chapter assesses SISD's financial management functions in three areas.

- A. Finance Department Operations
- B. Planning and Budgeting
- C. Revenue and Debt Management

Successful financial management operations ensure that the district receives all available revenue from the state and federal governments; maintain a track record of sound financial decisions and adequate and equitable budget allocations; issue timely, accurate, and informative reports on the district's financial position; maintain adequate internal controls; employ a skilled staff; and maintain a consistent record of unqualified audit opinions.

SISD's Finance Department has strong basic accounting functions, as indicated by clean and unqualified annual audits and quick closing of the books and records. However, the department could be streamlined by eliminating unnecessary tasks, strengthening internal controls, and performing more budget analysis. The district has been active in pursuing state funding, including revenues offered under the new Instructional Facilities Allotment, but has not sought other federal funds as aggressively as it could.

BACKGROUND

SISD's enrollment rose by 18 percent between 1992-93 and 1996-97. This increase was particularly notable at the high school level, where enrollments rose by almost 30 percent. This explosive enrollment growth has forced the district to hold bond elections to fund additional construction. SISD's revenues and expenditures by fund are shown in **Exhibit 6-1**.

Exhibit 6-1

Revenues & Expenditures By Fund

1996-97 School Year

	Actual 1996-97		Budgeted 1997-98	
Category	Revenues	Expenditures	Revenues	Expenditures

General Fund	\$97,600,554	\$100,223,213	\$103,287,280	\$103,287,280
Special Revenue Funds	13,231,450	12,675,193	10,391,227	10,391,227
Total	\$110,831,994	\$112,898,406	\$113,678,507	\$113,678,507

Source: SISD 1996-97 annual financial report

Although SISD is far from wealthy, the community overwhelming supports the district and its administration and has repeatedly approved the sale of bonds to finance construction.

Due to its low property tax values, most of SISD's revenues come from state aid (**Exhibit 6-2**).

Exhibit 6-2

SISD Revenue Sources

1994-95 through 1996-97

Revenue	1994-95		1995-96		1996-97		1997-98	
Local	\$22,007,009	22%	\$26,961,572	23%	\$30,328,552	25%	\$33,219,591	26%
State	68,778,359	69%	79,719,837	68%	80,987,319	67%	88,188,434	68%
Federal	8,929,639	9%	10,097,434	9%	9,992,373	8%	8,650,896	6%
Total	\$99,715,007	100%	\$116,778,843	100%	\$121,308,244	100%	\$130,058,921	100%

Source: SISD Annual Financial Reports

As shown in this exhibit, revenue from local tax sources is increasing as property tax values in the area rise. This trend is likely to slow temporarily due to recent increases in the property tax exemption to \$15,000, but may level out as SISD continues to develop.

As one would expect, SISD's expenditures have increased with its enrollment. Compared to its peer districts, SISD's operating costs are low but its debt service and capital outlay costs are high due to ongoing construction (**Exhibit 6-3**).

Exhibit 6-3

Selected Expenditures as a Percentage of Total Expenditures

SISD Versus Peer Districts

1996-97 School Year

District	Operating Expenditures	Debt Service	Capital Outlay
Laredo	95.0%	2.7%	2.3%
Ysleta	94.6%	3.6%	1.8%
Pharr/San Juan/Alamo	93.6%	2.9%	3.5%
El Paso	88.0%	6.7%	5.4%
Edinburg	87.8%	4.5%	7.7%
United	85.3%	13.0%	1.8%
Socorro	82.1%	9.4%	8.5%
Southwest	77.4%	3.5%	19.0%

Note: United's capital outlay percentage above is low compared to previous year's capital outlay due to its decision to delay building new campuses during the 1996-97 year.

Source: AEIS

Exhibit 6-4 summarizes SISD's expenditures by function over the last four years.

Exhibit 6-4

Expenditures by Function

1993-94 through 1996-97

Expenditures	1993-94	1994-95	1995-96	1996-97
Instruction	\$44,939,437	\$47,845,830	\$53,878,587	\$56,632,677

Instructional Administration	1,559,090	1,655,959	1,680,843	1,482,434
Campus Administration	4,759,293	5,031,480	5,527,629	6,508,409
Central Administration	4,010,572	4,347,724	4,689,846	3,203,989
Support	6,338,610	6,772,468	7,242,146	5,946,430
Plant Services	11,218,549	10,277,021	11,195,750	13,846,410
Other Operating	7,953,737	7,800,225	8,479,600	7,444,965
Total Operating	\$80,779,288	\$83,730,707	\$92,694,401	\$95,065,314
Community Services	191,003	447,393	396,005	468,575
Debt Service	6,304,423	7,118,241	8,755,773	464,726
Capital Outlay	6,927,607	5,339,342	4,805,055	4,224,598
Total Non-Operating	13,423,033	12,904,976	13,956,833	5,157,899
Total Expenditures	\$94,202,321	\$96,635,683	\$106,651,234	\$100,223,213

Source: AEIS

As shown in **Exhibit 6-5**, SISD's operating budget for 1997-98 is \$114 million. Instructional expenditures account for \$75 million of that total, or 66 percent of the total operating budget.

Exhibit 6-5

SISD Functional Expenditures Budget

1997-98

	All Funds Budget 97-98	Operating Budget 97-98	General Budget 97-98
Instructional Administration	\$66,557,786	\$66,557,786	\$62,542,476
Instruction Related	8,261,661	8,261,661	8,192,645
Public Services	18,348,727	18,348,727	12,112,611
Administration	3,259,414	3,259,414	3,259,414
Maintenance	13,773,713	13,773,713	13,772,113

Community Services	565,474	565,474	496,289
Facilities	6,340,036	1,340,036	1,340,036
Data Processing	1,189,356	1,189,356	1,189,356
Debt Service	12,512,754	382,340	382,340
Total Expenditures	\$130,808,921	\$113,678,507	\$103,287,280

Source: SISD Budget

SISD's central administration costs average \$143 per student, which is low compared to its peer districts that average about \$173 per student. SISD also spends more on bilingual education and career and technology programs than its peers, although it spends less on regular education programs. **Exhibit 6-6** compares SISD's expenditure and productivity statistics to those of its peer districts.

Exhibit 6-6

Comparative Profile of Financial Performance, SISD versus Peer Districts

1996-97 School Year

District	Total Expenditures per Student	Instructional Expenditures per Student	Students per Employee	Student Teacher Ratio
Southwest	\$6,287	\$2,944	8.39	14.9
Edinburg	\$5,668	\$3,043	7.72	15.9
Socorro	\$5,487	\$2,485	8.97	16.2
Pharr/San Juan/Alamo	\$5,408	\$3,044	7.33	16.0
Laredo	\$5,073	\$2,877	7.17	16.4
El Paso	\$5,013	\$2,632	8.73	15.9
Ysleta	\$4,885	\$2,769	9.15	15.8

United	\$4,875	\$2,410	8.45	16.6
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Source: AEIS

SISD ranks third-highest in expenditures per student due to the cost of its debt service and capital outlays. However, the district ranks second-lowest in instructional expenditures per student. SISD ranks third in overall productivity, measured as the number of students per employee. SISD also has the third-highest pupil-teacher ratio among its peers.

Chapter 6

FINANCE DEPARTMENT OPERATIONS

The Finance Department's mission is to provide a fiscally responsible academic environment that serves the interests of the students, staff, faculty and taxpayers of SISD through effective implementation of accounting, budgeting, and purchasing programs and compliance with applicable regulations and laws.

The Finance Department has established the following goals for the 97-98 school year.

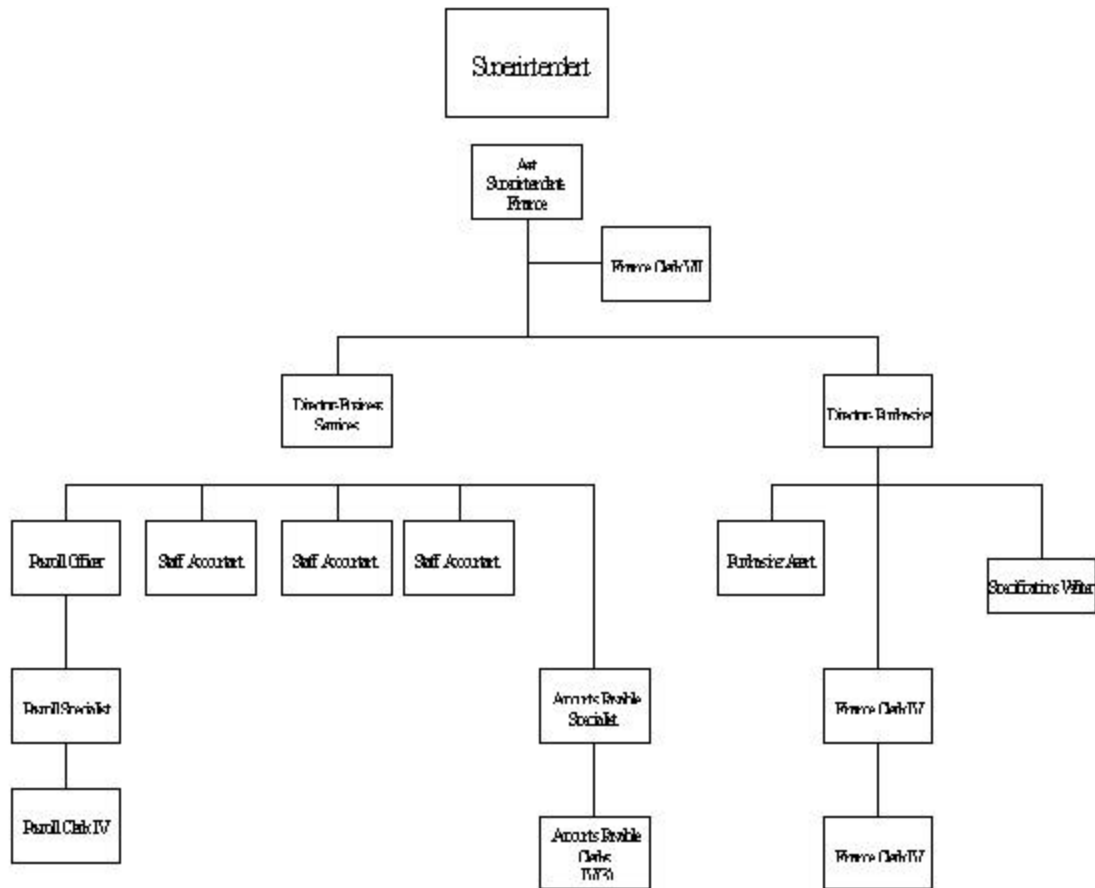
- To successfully select and implement a state-of-the-art automated financial system to replace current non-Year 2000-compliant software [Pentamation] that will provide easily accessible financial data in a timely manner so that well-informed budgetary decisions may be made.
- To implement an automated timekeeping system that will provide better accountability throughout the district while improving efficiency and accuracy in the Payroll Department.
- To establish mechanisms whereby the transfer of finance-related paper documents and reports between departments and campuses is in large part eliminated.
- To provide a workplace where employees feel they are an important part of the district and that their jobs help support district objectives and goals.
- To provide user-friendly procedures manuals covering all finance-related areas including budgeting, purchasing, payable, payroll, student activities accounting, and fund-raising.
- To examine the feasibility of creating a district internal audit department within the district to determine the adequacy of internal controls, ensure compliance with procedures, regulations, policies and law, and evaluate the efficiency and effectiveness of operations.

The department's organization is depicted in **Exhibit 6-7**.

Exhibit 6-7

Finance Department Organization Chart

1996-97



Source: SISD Finance Department

The Finance Department is led by the assistant superintendent of Finance who is responsible for both financial management and purchasing. The Finance Department has added only one position in the last five years.

The department's accounting and reporting functions are carried out by the director of Business Services, who is responsible for coordinating the development of all required journal entries into the accounting system, ensuring that proper amounts are posted from subsidiary systems, and generating monthly system reports and financial statements.

SISD's current general ledger software does not provide the tools needed to automatically produce financial statements. Reports printed from the Pentamation system are manually entered into an Excel spreadsheet that

summarizes individual account information in proper financial statement summary accounts. The director's goal is to have these financial statements prepared by the 15th of each month.

The district employed new external auditors beginning with the 1995-96 school year. The previous firm had performed the external audit for eight years. The district does not have a formal policy for rotating its external auditors; instead, they serve at the will of the board. SISD's 1996-97 audit cost the district \$46,000.

The amended budget for the 1996-97 school year and the proposed budget for the 1997-98 school year for the Finance Department are described in **Exhibit 6-8**.

Exhibit 6-8

Finance Department Budget

1996-97 through 1997-98

Category	1997-98 Proposed Budget	1996-97 Amended Budget
Payroll Costs	\$ 5,096,154	\$ 4,737,121
Contracted Services	537,250	476,140
Supplies & materials	55,000	38,900
Other Operating Expenses	6,400	5,200
Debt Service	382,340	421,132
Capital Outlay	0	100,000
Total	\$ 6,077,144	\$ 5,778,493

Source: SISD Budget Report

Finance operates on a Pentamation Leadership series computer system. SISD converted to this system during the 1994-95 school year due to the discontinuation of the Region XIX software support group. The district was given less than a year to choose and convert to the new system. As noted above, this series of Pentamation is not Year-2000 compatible; therefore, the district must again convert to a new system prior to the year 2000. At this writing, the district is preparing a request for proposals for

new software. This conversion will be a significant undertaking for the Finance Department as all systems, including accounts payable, payroll, fixed assets and the general ledger, must be converted.

FINDING

The Finance Department does not perform a fiscal feasibility analysis on major projects requiring board approval. In recent years, SISD has completed several such projects, including the building of the Aquatics Center, conversion to Year-Round Education, various technology investments, and the construction of new schools to accommodate increasing enrollment. The Finance Department was not asked to perform feasibility studies to determine the costs and benefits of any of these projects.

Earlier this year, during the 1997-98 budget process, the board reduced the district's local property tax rates. When TSPR's review team examined the district's analysis of various tax rate alternatives, they found it to be a simple calculation of the revenue that would be generated by various tax rates. It did not include any consideration of the effects of a proposed increase in the state's homestead exemption, any extended analysis of projected revenues at the new rates, or the effect of a new tax rate on state funding to the district.

Recommendation 49:

Require the Finance Department to perform a complete fiscal feasibility analysis for every project or financial decision requiring board approval.

Each feasibility analysis should include different assumptions to reflect a range of possible outcomes. A best-case scenario, a worst-case scenario and an expected or break-even outcome would give the board sufficient information to evaluate the risks and make an informed decision.

Each analysis should include multi-year (based on the length of the decision's impact) projections of revenues and expenditures. Projected expenditures should be divided between fixed costs (plant and equipment) and variable costs (salaries and supplies), as variable costs will fluctuate under various assumptions. Graphs should be used to communicate the financial outcomes of each scenario in terms that can be grasped by the board.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The board approves a policy requiring a feasibility analysis for every	May
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	project or financial decision requiring their approval.	1998
2	The assistant superintendent of Finance provides the director of Business Services with the training needed to perform the feasibility analysis.	June 1998
3	The assistant superintendent for each district area communicates ideas for new projects or facilities as projects are proposed and at the beginning of the budget process.	As needed
4	The assistant superintendent of Finance requests the information that will be needed to perform an accurate feasibility analysis.	As needed
5	The director of Business Services completes the analysis and submits it to the assistant superintendent of Finance.	As needed
6	The study is provided to the board of directors at the first budget workshop for their review and consideration.	As needed

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

Some of the responsibilities performed by the department's accountants are activities that are typically performed by an accounting clerk. The district's accountants review the reasonableness of the accounting codes charged on purchasing orders. Another accountant inputs fixed asset information in the accounting system. Accounting clerks in other industries typically perform these activities.

Recommendation 50:

Reassign some of the accountant's duties to accounting clerks.

By reassigning responsibilities, the accountants will have more time to devote to activities such as allocating indirect costs to the campuses and departments and performing fiscal feasibility studies for district undertakings, that require accountant level expertise.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The assistant superintendent of Finance reviews the responsibilities assigned to the staff in the Accounting Department.	June 1998
2	The assistant superintendent of Finance assigns duties that can be performed by an accounting clerk to the clerks in the department.	August 1998

Duties that can be performed by the accountants are distributed.	
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FISCAL IMPACT

There is no fiscal impact to the district to implement this recommendation.

FINDING

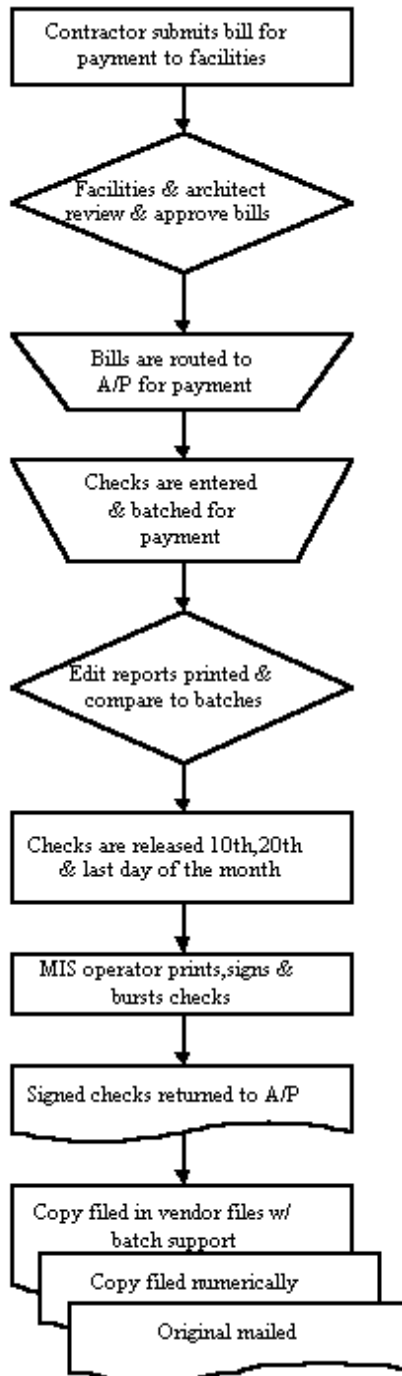
The Finance Department does not review the reasonableness and accuracy of the district's construction bills. Strict procedures exist for the payment of all other types of bills, but construction bills seem to be exempt from the procedures governing the normal purchasing cycle. Since SISD's largest payments to vendors go to construction companies, it is imperative that the Finance Department review these bills for reasonableness and accuracy prior to payment.

SISD's current process flow for construction bills is illustrated in **Exhibit 6-9**.

Exhibit 6-9

Construction Bill Process Flow

1997-98



Source: Finance Department interviews

SISD's director of Facilities and its architect, who is an independent third-party vendor, are the only personnel who review these bills. The district has no other internal system of checks and balances to ensure that these expenditures are appropriate and accurately billed.

Recommendation 51:

Implement procedures to improve controls over construction expenditures.

Personnel in both the Purchasing and Facilities Departments should be responsible for reviewing each bill submitted by the contractor, ensuring that the bills are accurate, and that the billed work has been performed. A Finance Department accountant should review each bill for appropriate approval signatures and cross-reference the amounts billed to the supporting documentation to ensure that all amounts are totaled correctly.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The director of Purchasing writes new procedures to ensure that Purchasing and Facilities personnel review each bill and ensure that the goods billed for have been received. The procedures should require that the bill be compared to the signed contract to ensure that it complies with the terms of the contract. Both departments' signatures on the bill should be necessary before the bill can be submitted to Accounts Payable for payment.	March 1998
2	The director of Business Services writes new procedures that ensure that each construction bill is reviewed by an accountant. The review should verify that Facilities and Purchasing have complied with written procedures by signing the bill. The accountant then should cross-reference the amounts billed to attached supporting documentation, ensuring that all amounts are totaled correctly.	March 1998
3	The assistant superintendent of Finance reviews and approves all written procedures.	April 1998
4	The assistant superintendent of Finance submits the procedures to the superintendent for approval and distribution to affected departments.	May 1998
5	The assistant superintendent of Finance implements the new procedures. No further payments are made without approval signatures from Purchasing, Facilities, and Finance.	June 1998

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

The Accounts Payable supervisor can set up new vendors and input payable information on the district's accounting system. This leads to an unnecessary internal control risk, in that it is possible for one person to set

up and issue checks to a fictitious vendor. SISD's standard procedure calls for the Purchasing Department to set up new vendors, but the accounts-payable supervisor also has the same authority.

Recommendation 52:

Allow only Purchasing Department personnel to set up and amend vendor information and only Accounts Payable personnel to input payable information.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The assistant superintendent of Finance changes the authority levels in the software to allow only Purchasing Department personnel to set up and amend vendor information. When this is accomplished, Accounts Payable will have the ability only to input payable information.	April 1998
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FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

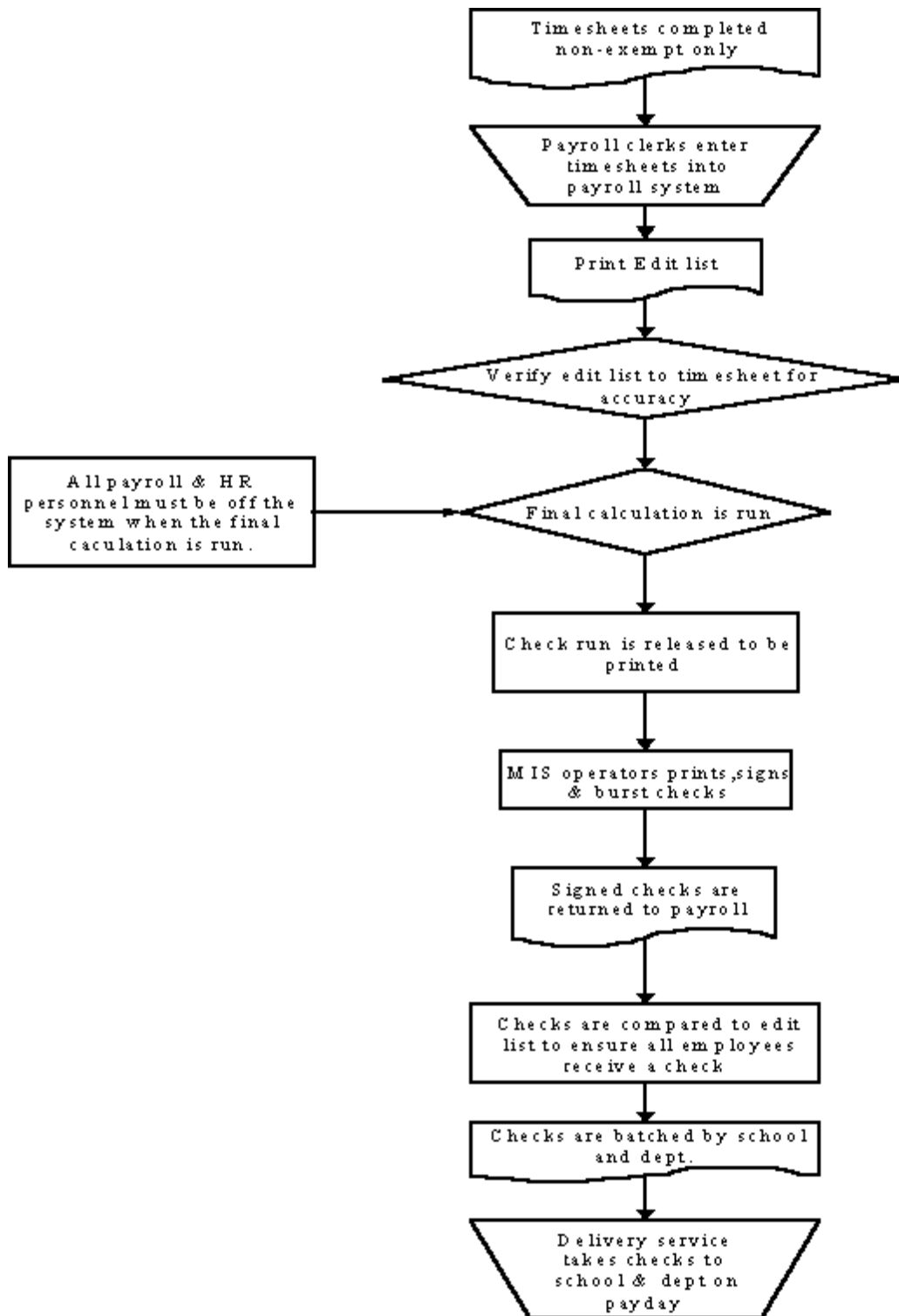
About a fifth of SISD's employees are non-exempt, meaning they receive overtime if they work in excess of 40 hours per week. All non-exempt employees are required to submit timesheets to the payroll area. Exempt employees are paid the same regardless of overtime worked, and are not required to submit timesheets. The process flow for the payroll at the district is shown in

Exhibit 6-10.

Exhibit 6-10

Payroll Process Flow

1997-98 School year



Source: Finance Department interviews

Original signed accounts-payable and payroll checks are printed and signed by the printer operator. The checks are returned to the Accounts Payable and Payroll Departments for mailing and the filing of supporting

documentation. This is an internal control weakness since the Payroll and Accounts Payable supervisors have the ability to set up new vendors and new employees and authorize payments.

In a properly controlled environment, original signed checks are not returned to the originating department but are mailed directly after signing.

Recommendation 53:

Ensure that all original signed checks are mailed and delivered by someone outside the department originating the check.

At SISD, this could be accomplished by delivering the signed checks to the Finance Department's receptionist for mailing or delivery to campuses and departments.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The assistant superintendent of Finance ensures that all original signed checks are mailed and delivered immediately after signing by someone outside the originating departments.	Immediate
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FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 6

PLANNING AND BUDGETING

CURRENT SITUATION

SISD, like all Texas public school districts, must develop a budget each year for board approval. State law requires that the district adopt a budget for the school year before adopting a tax rate for the tax year in which the budget begins. SISD initiates its budgeting process each February.

Exhibit 6-11 presents the district's budget calendar applied in 1997 for the 1997-98 school year.

Exhibit 6-11

Budget Calendar

Fiscal 1997-98

Time line	Activity	Responsibility
March 10	Set campus and program allocations	Management Team
March 21	Distribute budget packets to the campuses and departments	Assistant Superintendent of Finance
April 15-May 2	Conduct budget entry training	Tech/Finance Staff
March 21 - May 16	Develop and input budgets into software program	Budget Managers
May 27	Hold board workshop	Management Team
May 19-30	Conduct initial review of budgets	Review Committees
June 9-20	Hold budget hearings - All budget	Supt. Review Comm.
June 17	Adopt compensation plan	Management Team
July 7-28	Conduct final review	Supt. Review Comm.
July 25	Certify appraisal roll	County Appraisal District
August 7	Hold board workshop	Management Team
August 9	Hold election to decide homestead exemption issue	

August 18-22	Publish notice of effective tax rates	City Tax Office
August 14	Hold board workshop	Management Team
August 21	Hold board workshop	Management Team
August 18	Publish notification giving 10 days notice on adoption of 1997-98 budget	Assistant Superintendent of Finance
August 28	Adopt 1997-98 budget	Board of Trustees
September 2	Adopt tax rate at regular board meeting	Board of Trustees

Source: SISD - Budget Development Calendar 1997-98

The mission of SISD's budgeting process for the 1997-98 school year, as described in the proposed budget, is as follows:

Budgeting is the process of allocating resources to the prioritized needs of the school district. Budgets play an important role in the planning, control, and evaluation of district operations, providing an important tool for the control and evaluation of the district's source and uses of resources. The adoption of a budget implies that a set of decisions have been made by school members and district administrators which culminate in matching resources with needs.

Each campus receives appropriations on a per-student basis that is adjusted based on actual average daily attendance after the first two six-week attendance periods of the new year. This amount is used to cover the following areas as needed, as well as other areas identified by individual campus committees:

- Substitutes for teachers, custodians, and office personnel
- Overtime/extra duty for custodians, security, and office personnel
- Peer and before/after school tutoring
- Campus monitors
- Audio-visual and office equipment rentals, usage, and repairs
- Instructional and administrative supplies
- Postage
- Instructional and administrative equipment
- Telephone charges, both local and long-distance
- In-district and out-of-district printing
- Library supplies, equipment, periodicals, and books

- Administrative travel
- Transportation (instructional and extracurricular)
- Student travel
- Catering costs

In addition, each campus receives allocations for other special programs such as bilingual education, gifted and talented programs, special education, intercession, technology, and staff development.

Basic allotments and amounts allocated to the schools for special programs for 1994-95 and 1997-98 illustrate how much the district has increased these expenditures over time (**Exhibits 6-12 and 6-13**).

Exhibit 6-12

Campus Allocations per Student

1994-95 versus 1997-98

Description	1994-95	1997-98
High School - Basic Allotment per ADA	\$100.00	\$185.00
Middle School - Basic Allotment per ADA	\$80.00	\$165.00
Elementary School - Basic Allotment per ADA	\$65.00	\$135.00

Source: 1994-95 and 1997-98 Budgets

Exhibit 6-13

Program Allocations

1994-95 versus 1997-98

Description	1994-95	1997-98
Bilingual	\$365,288	\$453,492
Gifted & Talented	222,300	250,107
Intercession	510,137	619,926
Special Education	78,000	130,050
Maintenance Discretionary Funds	115,306	148,300
Technology	461,823	619,926

Staff Development	418,600	510,400
Other Allocations	45,605	0
Total of all programs	\$3,542,753	\$5,943,791

Source: 1994-95 and 1997-98 Budgets

Campus goals and their implementation are tied to the proposed budget. Campuses request additional funds and personnel in writing with justifications and costs presented during the budget review. Principals make staff development and capital outlay requests through special forms that explain in detail the purpose of the request.

A Campus Budget Committee, composed of members appointed by the principal, develops each campus budget. Committee members generally include the principal, assistant principal(s), teachers, parents or other community members, students (at the secondary level), and representatives from the business community.

Each principal presents a proposed budget for their campus to a Campus Review Committee. The committee presents capital outlay and staff development activity requests at this time for review and consideration by the principal. After this review, the budget is subject to further review by the superintendent's Review Committee. Requests for additional funds and personnel are examined by the superintendent's committee.

The SISD board reviews the budget process, receives ongoing status reports, and provides input in the budget development process until adoption of the budget.

After the budget is approved and implemented, the district has an encumbrance system that precludes purchases above the budgeted amount.

FINDING

The board budget workshop package compares proposed expenditures by area to the prior year's actual spending (**Exhibit 6-14**). This package is presented to the board and is the primary information source used by board members to make budget decisions.

Exhibit 6-14

Example of Report in the Board Budget Workshop Package

Fiscal 1997-98

School / Category	Proposed 1997-98 Approp.	Final 1996-97 Approp.	Percent Difference
Socorro High School			
Payroll Costs	\$8,451,866	\$7,987,145	5.82%
Contracted Services	\$437,131	\$359,707	21.52%
Supplies & Materials	\$456,285	\$511,420	-10.78%
Other Operating Expenses	\$160,118	\$103,744	54.34%
Capital Outlay		\$9,000	-100.00%
Total - Socorro High	\$9,505,400	\$8,971,016	5.96%
Montwood High School			
Payroll Costs	\$7,991,424	\$7,977,354	0.18%
Contracted Services	\$498,552	\$439,837	13.35%
Supplies & Materials	\$467,583	\$462,755	1.04%
Other Operating Expenses	\$173,569	\$113,467	52.97%
Capital Outlay	\$15,000	\$26,500	-43.40%
Total - Montwood High	\$9,146,128	\$9,019,913	1.40%

Source: 1995-96 Budget

The explanation for payroll cost increases is detailed in the packet in a separate section, as follows:

Payroll Cost have increased about \$8.3 million due to the following:

- New positions in the budget \$5.2 million
- Salary increases granted by the board \$2.6 million
- Fringe benefit increases \$.5 million

This explains the total increase in payroll costs but does not justify the increase based on desired staffing levels. For example if enrollment increased by 2,400 student, two assistant principals would be required based on the district's budget allocation formula. The budget packet also includes a section that explains each position that is being added and its cost, but does not tie the position to the campus or departmental budget. A useful explanation would include the impact on staffing ratios and whether staffing formulas were used. Peer district data would also be useful.

Supplies and materials and other operating expenses are shown only in total and not on a per-student or per-unit basis. This would show whether costs have increased due to enrollment or factors that require further justifications.

Recommendation 54:

Improve budget workshop packages to provide per-student and per-unit analysis as well as trends in financial performance and peer or benchmark data.

This information should be included in the board budget packets to assist the superintendent and the board of directors in analyzing the budget for reasonableness.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The assistant superintendent of Finance prepares trend analysis, and/or peer analysis of per student financial information and other per unit data, such as utility expenditures per square foot.	June 1998
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FISCAL IMPACT

SISD could change its budgeting procedures at no additional cost. Savings may result from a more thorough understanding and justification of requested expenditures.

FINDING

SISD's budget allocations do not effectively meet the demands of its multitrack schools. The current district administrative regulation on school staffing allocations dates from 1990, before the introduction of Year-Round Education. The regulation establishes basic guidelines for staffing to be used in preparing the budget. The superintendent or his designee must individually approve exceptions to the listed ratios. The review team was told that the district has an informal policy that gives multitrack schools the funds to hire an additional assistant principal, but the district

could not provide the review team with written documentation of this policy. **Exhibit 6-15** illustrates the staffing at a one-track elementary school and a four-track elementary.

Exhibit 6-15

School Resource Allocation

1996-97

Resource	Regulation	Hueco Elementary	Sierra Vista Elementary	Ball Elementary
Number of Tracks	n/a	1	4	4
Enrollment	see below	540	923	1249
Number of Principals	1	1	1	1
Number of Assistant Principals	1*	1	2	1*
Number of Counselors	1	1	3	1
Number of Librarians	1	1	1	1
Number of Nurses	1	1	1	1

*One additional assistant principal was allocated later in the year when enrollment exceeded 1,200. There are currently two assistant principals at Ball.

Source: PIEMS data

Hueco Elementary's administrative support is in line with the administrative regulation, and it is a single-track school with 540 students. However, the allocation method used in the budget process is not sensitive to the number of tracks at a school, which has a direct bearing on resource needs. For example, an additional assistant principal position was approved for Ball Elementary during the 1996-97 school year. Had the

allocation formula been applied, this position would have been filled in a previous year.

Recommendation 55:

Modify school allocation methods to ensure the equitable allocation of resources among all tracks and schools.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The assistant superintendent of Finance writes new budget allocation procedures with the assistance of the principals to determine an equitable allocation of resources.	March 1998
2	The superintendent reviews and approves the procedures.	March 1998
3	The Board of Trustees reviews and approves the procedures.	October 1998
4	The superintendent incorporates the new procedures into the budget packets for distribution to the campuses.	February 1999

FISCAL IMPACT

This recommendation would reallocate existing resources, but it should not cause any significant fiscal impact overall.

FINDING

Indirect costs are expenses that cannot be directly attributed to a department or campus. Examples of indirect costs include; technology costs, and maintenance expenses. The district allocates trash pick-up costs to the Maintenance and Food service department. The Print shop usage is also allocated to the department based on actual usage. However, technology costs and maintenance expense are not allocated to the departments or schools in the district. Allocating these indirect costs to the schools would allow the district to more accurately compare costs among campuses and to peer campuses. More importantly, allocation of indirect costs makes it possible to hold supervisors responsible for the costs of maintenance and technology costs.

The district told the review team that it does not allocate these costs due to the inability of individual departments to absorb them. For example, during 1995-96, the Food Services Department's budgeted expenditures

exceeded its revenues by nearly \$501,000. If the indirect costs of maintenance had been allocated to the department, it would have increased expenditures and worsened the expected deficit.

Since food service shortages are paid from general revenue funds, the district saw no benefit to shifting expenses on paper from one fund or function to another. But in the absence of information about the cost of utilities, the food service department cannot be expected to contain these cost or take appropriate action to reduce expenses. Should the food service department become profitable in the future, the recovery of indirect cost could improve the position of the general revenue fund.

Recommendation 56:

Allocate indirect costs to campuses and departments to make them aware of and accountable for total costs.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The assistant superintendent of Finance performs a historical analysis of costs incurred by individual departments that are not allocated to the departments and develops an appropriate allocation method for each cost.	March 1998
2	The director of Business Services writes procedures on how to allocate these costs to the departments on a monthly basis.	May 1998
3	The assistant superintendent of Finance incorporates the allocation methods into each departmental and campus budget and communicates the change to management.	June 1998
4	The budget process is prepared with each department director and campus principal factoring the newly allocated costs into their budgets.	June 1998
5	The assistant superintendent of Finance begins allocating the costs on a monthly basis beginning with the new school year.	September 1998

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

Chapter 6

REVENUE AND DEBT MANAGEMENT

As discussed in Section A of this chapter, state aid is SISD's primary source of revenue. The district has two separate property tax rates that generate revenues, one for school district operations and maintenance and another for debt service. SISD's combined calculated tax rate of 1.47 per \$100 of valuation generated \$26 million during the 1996-97 school year. **Exhibit 6-16** shows the local property tax rates for the last five years.

Exhibit 6-16

History of Tax Rates

1993-94 through 1996-97

Year	Maintenance	Debt Service	Total	Appraised Values
1993-94	\$.98	\$.50	1.48	\$1,149,509,897
1994-95	\$.90	\$.58	1.48	\$1,256,773,807
1995-96	\$.89	\$.58	1.47	\$1,584,264,538
1996-97	\$.92	\$.55	1.47	\$1,775,412,429
1997-98	\$.75	\$.63	1.38	\$1,789,819,807

Source: 1996-97 Annual Financial Report & Finance Department

Rising appraisal values prompted the district to lower its tax rate for 1997-98 to \$1.38. **Exhibit 6-17** compares SISD's 1996-97 tax rate to those of its peer districts. The districts are ranked from the lowest to highest total tax rate.

Exhibit 6-17

Comparison of Tax Rate to Peer Districts

1996-97

District	Tax Rate
Pharr/San Juan/Alamo	\$1.50
Ysleta	\$1.65
El Paso	\$1.515
Southwest	\$1.314
Socorro	\$1.47
Edinburg	\$1.395
United	\$1.383
Laredo	\$1.215

Source: AEIS data

Funds received to support debt service pay principal and interest on bonds used to fund the construction of new facilities for the district. SISD has \$131.6 million in outstanding debt and paid debt service of \$10 million during 1996-97. SISD's construction programs have led to significant debt service requirements, causing SISD's debt service tax rate to be higher than all but one of its peer districts. The district has consistently refunded the bonds to achieve interest savings and is considering another refund for the 1997-98 school year.

In 1996-97, SISD received \$81 million or 67 percent of its total revenue from state aid. State funding flows through a two-tiered system. Tier I is the basic program of equalized support for public education that is financed through state aid and local property taxes. To be eligible for Tier I funds, districts must levy a property tax of at least 86 cents per \$100 of taxable property value. Tier I includes funding for basic education as well as special education, gifted and talented, vocational, bilingual, and compensatory programs and transportation.

Tier II provides additional support to low-wealth school districts. Each district is guaranteed a specific amount per student in state and local funds for each cent of tax imposed by the school district. These funds may be used for maintenance and operations, capital outlay, or debt service. Tier II, on a statewide basis, averages an additional \$1,700 per student. SISD received \$22 million in Tier II funds in 1996-97.

During 1996-97, SISD received about \$10 million in federal funds, representing 8 percent of its revenue. Almost one-third of these funds are

Title I funds for at-risk children. The district complies with all three tests of the Title I program, according to the Texas Education Agency (TEA). The three tests reviewed by TEA are Maintenance of Effort, which reviews the district's historical expenditures to ensure they are in line with the student population; Comparability of Service, which compares the district to other districts with similar student populations; and the Supplant-Supplement test, which ensures that the funds are used to provide extra programs in addition to regular instruction.

Another \$4 million in revenue came from the National School Lunch Program, which provides free and reduced-price lunches to economically disadvantaged students. Other major sources of federal funds include the Individual with Disabilities Education Act, which provided more than \$500,000 to the district's special education program, and the Urban Systemic Initiative, which provided more than \$600,000 in additional revenues.

FINDING

A report issued by an El Paso investment banking firm alerted SISD officials to the fact that the district should qualify for aid under a new state law that authorizes the state to pay portions of the debt service used to build qualified school facilities. The report commented that SISD would be eligible for state contributions of up to 68.4 percent of debt service issued under the new Instructional Facilities Allotment (IFA) program because SISD sold \$20 million in bonds during 1996, and another \$25 million of bonds have been authorized.

The IFA program is intended to equalize the burden of debt service for school construction and is available to all districts legally authorized to enter into debt or leases. Financed construction must be instructional facilities and may include site acquisitions, site development, new schools, major additions, major repairs, and communication/technology and equipment.

The first round of applications for the IFA program was due on September 8, 1997, but the district was not able to submit an application in time. The next application for the program was due on December 15, 1997; this time, SISD was ready, and submitted an application. The district's application was approved and SISD will receive \$1,284,441 during 1998-99.

COMMENDATION

The district has acted to take advantage of the state's Instructional Facility Allotment and will receive \$1.3 million for debt service.

FINDING

The responsibility for grant writing in SISD has been distributed among the departments that benefit from such grants. In 1997-98, the district added a position in Strategic Planning to coordinate and write grant applications, among other duties. Some areas, such as the Community Education Department, have been very effective in identifying and obtaining grants. SISD also has applied for grants from the Governor's Criminal Justice Division, the Comprehensive Developmental Guidance Program for Elementary At-Risk Students, the Safe and Drug-Free Schools and Communities program, and the National Science Foundation's Urban Systemic Initiative.

In the early 1990s, SISD's Office of Bilingual Education received two federal Title VII grants. Since then; however, the funding period for these two grants has expired and the office has no plans to apply for additional grants at this time. Furthermore, the district has never applied for any competitive federal or state grants in the areas of special education, gifted education, or any academic content areas other than science (such as english or mathematics). SISD has not sought any private sector foundation grants, such as training grants supporting middle school reform. Many other federal grants are available and can be found in the *Guide to Federal Funding Education*, produced by the Education Funding Research Council.

For the 1996-97 school year, SISD received a lower amount of federal revenue than its neighboring districts, despite the fact that it has the greatest share of economically disadvantaged children (**Exhibit 6-18**).

Exhibit 6-18

Federal Revenue and Share of Economically Disadvantaged Children

SISD Versus Neighboring Districts

1996-97 School Year

District	Federal Revenue (Percentage of total funding)	Share of Economically Disadvantaged Children
El Paso	10.8%	67.20%
Ysleta	10%	68.10%
Socorro	8.23%	70.40%

Source: 1996-97 financial information and AEIS Data

Recommendation 57:

Create a full-time position in the Division of Strategic Planning to oversee grant writing.

Since a high percentage of SISD's students are economically disadvantaged or belong to language and ethnic minority groups, the district should actively seek additional federal, state, and private funding to support innovative programs, staff development, and research to assist these children with special needs. The specialist should research and apply for competitive state and federal grants as well as grants from private foundations and businesses. The position also would oversee and provide technical assistance to other district departments that pursue grants independently.

IMPLEMENTATION STRATEGIES AND TIMELINES

1	The assistant superintendent of Strategic Planning and the assistant superintendent of advertise for the new position.	April 1998
2	The assistant superintendent of Strategic Planning and the assistant superintendent of Personnel interview applicants and recommend one for the position.	June 1998
3	Once hired, the grant writing specialist reviews the district's current programs, identifies the district's greatest needs, researches available federal, state, and private grants, and begins to submit grant proposals or seek help in doing so from other departments or schools.	August 1998 - Ongoing

FISCAL IMPACT

The fiscal impact of this recommendation is based on a salary of \$45,000 per year plus fringe benefits of \$8,476. The new position should be able to generate additional revenues of \$200,000 annually, which represents a 2 percent increase in federal funding and private grants based on actual 1996-97 federal funding of \$9,992,373.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Create full-time position to oversee grant writing.	(\$53,476)	(\$53,476)	(\$53,476)	(\$53,476)	(\$53,476)
Additional federal	\$200,000	\$200,000	\$200,000	\$200,000	\$200,000

revenue generated by grant writer					
Total Savings	\$146,524	\$146,524	\$146,524	\$146,524	\$146,524

Chapter 7

ASSET AND RISK MANAGEMENT

Chapter Contents:

- A. Insurance Coverage
- B. Cash Management
- C. Tax Collections
- D. Fixed Asset Management

The development of an effective asset and risk management program requires careful consideration of several areas. Insurance coverage must be adequate to cover the district's assets with the lowest possible premiums. Cash managers should seek investments with good interest potential while safeguarding the district's cash and ensuring liquidity to meet fluctuating cash-flow demands. Taxes should be collected quickly and efficiently to allow the district to meet its cash-flow needs and earn the highest possible interest. Fixed assets should be accounted for efficiently and safeguarded against theft and obsolescence.

SISD's insurance programs are well run and cost efficient. A new safety program has reduced the number of work-related injuries incurred by district employees. However, SISD does not perform cash forecasting. Fixed assets are inventoried and reconciled regularly, but an automated fixed-asset system could improve the process.

Chapter 7

INSURANCE COVERAGE

CURRENT SITUATION

A well-managed school district has a sound and complete risk management program that limits its exposure to financial losses through insurance coverage for district employees, students, and district assets. Some insurance coverage is compulsory, such as workers' compensation; some may be required for contractual reasons, such as fire insurance required under a bond program; and some is carried simply because of the risks inherent in everyday business.

The risk manager must develop, plan, and implement procedures to control the risks to which the district is exposed. The manager should work closely with other functional areas such as food services, transportation, human resources, legal, and accounting.

SISD's risk management program is administered by two directors employed in the Human Resources Department. Workers' compensation and health benefits insurance are administered by the director of Risk Management, while property/casualty insurance is handled by a director of Human Resources.

Workers' Compensation

Before March 1992, SISD purchased its workers' compensation coverage through the Texas Association of School Boards (TASB). In that month, the district introduced its own self-insurance program for workers' compensation. As a self-insurer, SISD absorbs the risk of workers' compensation losses up to a certain limit; any losses over the limit are covered by an excess insurance policy. SISD's excess insurance policy from Safety National Casualty Corporation covers any loss exceeding \$250,000 per occurrence. The district also has aggregate coverage, meaning that all additional losses are paid by Safety National after the district has paid more than \$2 million for losses over a three-year period. The self-insurance program is reviewed on an annual basis by an actuarial firm that establishes the amount needed in reserves.

SISD's self-insurance program is administered by a third-party administrator. The current administrator was selected by competitive bid in 1996. The administrator's contract with SISD renews automatically until either party chooses to terminate the contract.

The third-party administrator provides claims administration, consulting, claims adjustments, and risk data management services. SISD has established a claims fund through which the third-party administrator can pay claims and medical expenses, including allocated loss expenses. An average of \$70,000 is paid out of the account each month. SISD's Finance Department is responsible for reconciling this account each month. The district pays the third-party administrator's expenses in one annual payment, which was \$81,837 for the 1996-97 school year.

The district's safety rules are codified in a handbook issued to every employee. Each campus and facility has a safety committee to promote safety awareness among the staff and to hold monthly meetings to solve facility-related problems. The director of Risk Management assists supervisors throughout the district, who provide ongoing safety seminars for their employees.

FINDING

The director of Risk Management began working at SISD in 1991. He immediately implemented a well-rounded safety program. Policies relating to safety issues are reviewed annually to ensure that they meet the district's current needs.

The director recently completed an Accident Prevention Plan designed to ensure that district employees are accountable for their safety. Once approved by the board, the plan will establish standardized districtwide guidelines and record-keeping to ensure that all employees are oriented and trained appropriately.

SISD's self-insurance initiative has greatly reduced the district's workers' compensation premiums over the past five years. If the district had kept the old coverage, it would have paid at least \$9.5 million in workers' compensation over the past five years. Actual losses totaled about \$6.4 million. By adopting self-insurance, the district saved nearly \$3 million.

The self-insurance program has been very successful in reducing the number of workers' compensation claims by district employees. Although SISD's workforce has *increased* by 56 percent over the last five years, its number of claims has fallen by 18 percent (**Exhibit 7-1**).

Exhibit 7-1

Workers' Compensation Claims History

1992-97

Policy Year	Number of Employees	Number of Claims	Average Percent of Claims per Employee	Claims Paid	Reserves	Incurred Losses	Average Amount of Each Claim Incurred
1992-93	2252	239	10.6%	\$651,757	\$23,902	\$675,659	\$2,827
1993-94	2671	278	10.4%	\$612,685	\$4,701	\$617,386	\$2,221
1994-95	3112	272	8.7%	\$623,483	\$25,404	\$648,887	\$2,386
1995-96	3381	215	6.4%	\$588,675	\$55,515	\$644,190	\$2,996
1996-97	3510	196	5.5%	\$587,700	\$286,589	\$874,289	\$4,461

Source: Loss Run Reports provided by the Risk Management Department.

It should be noted that the substantial increase in average claims from \$2,996 in 1995-96 to \$4,461 in 1996-97 was due to an increase in the reserves on each claim made at the district's request. During the 1996-97 school year, the district asked the new third-party administrator to use the "ultimate loss" method for reserving funds for each worker's compensation claim. This higher reserve amount allows the district to accurately budget for future claim payments. The previous "stair-step" method set lower reserve amounts that were only enough to cover costs for the immediate future; this required frequent adjustments when payments exceeded reserves.

In spite of increases in the district's average claim amount, the 1996-97 level of \$4,461 is still substantially lower than the state average (**Exhibit 7-2**).

Exhibit 7-2

Workers' Compensation Claims History

1992-97

Policy Year	Number of Employees	Number of Claims	Incurred Losses	Average Claim per Year	State of Texas Average
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					Claims
1992-93	2252	239	\$675,659	\$2,827	\$13,515
1993-94	2671	278	\$617,386	\$2,221	\$13,861
1994-95	3112	272	\$648,887	\$2,386	\$13,603
1995-96	3381	215	\$644,190	\$2,996	\$11,068
1996-97	3510	196	\$874,289	\$4,461	\$7,317

Source: Risk Management Department and The Texas Workers' Compensation System Data Report (Pub.NO. EX97-001 B(9-97))

The director of Risk Management also operates a successful return-to-work program. The risk manager contacts each injured employee who is not working and works with the employee and his or her physician to find alternative work the employee can perform until he or she has healed sufficiently to resume normal work duties. This program has dramatically lowered the number of employee days lost to injuries (**Exhibit 7-3**).

Exhibit 7-3

Total Time Lost Due to Workers' Compensation Injuries

1992-97

Year	Number of Employees	Total Time Lost
1992-93	2252	4,813 days
1993-94	2671	4,145 days
1994-95	3112	4,003 days
1995-96	3381	3,914 days
1996-97	3510	3,721 days

Source: Risk Management Department - Data Templates

As can be seen in this exhibit, while SISD's workforce has increased by almost 1,300 persons since 1992, the number of days lost annually to workers' compensation injuries has fallen by more than 1,000 days.

COMMENDATION

SISD's self-insurance program has reduced premium costs while controlling and containing increases in workers' compensation claims.

Health Benefits

SISD offers health benefits to its employees through a health maintenance organization (HMO) plan for each employee that covers 100 percent of the cost of most services after a \$250 annual deductible. Copayments are \$10 for doctor's office visits and \$5 for prescription drugs. SISD pays for employee benefits, but employees are responsible for additional premiums to cover spouses and children. Employees can use doctors not in the HMO plan, but to do so they must pay 20 percent of the cost, with the policy covering the remainder.

Among the peer districts, only Corpus Christi ISD has lower costs than SISD (**Exhibit 7-4**).

Exhibit 7-4

Comparison of Costs and Coverage with Peer Districts

1997-98

District	Employer Contribution	Employee Contribution	Total Cost Per Employee
Socorro ISD	HMO - \$139 PPO - not offered	HMO - \$0 PPO - not offered	HMO - \$139 PPO - not offered
Ysleta ISD	HMO - \$181 PPO - \$197	HMO - \$0 PPO - \$0	HMO - \$181 PPO - \$197
Corpus Christi ISD	HMO Gatekeeper - \$109 HMO Open Access - \$124	HMO Gatekeeper - \$0 HMO Open Access - \$0	HMO Gatekeeper - \$109 HMO Open Access - \$124
Dallas ISD	HMO - \$110 PPO - \$110	HMO - \$49 PPO - \$124	HMO - \$159 PPO - \$234

Source: Risk Management Department and Peer Districts

FINDING

The district submitted a request for proposal for health benefits insurance prior to the 1996-97 school year. During 1995-96, the district paid \$167 per employee for health benefits. After choosing a successful bidder, the district paid \$133 per employee in 1996-97, and \$139 per employee in 1997-98.

SISD saved enough money by changing its insurance to fully insure its part-time employees (those who work 20 or more hours a week) for the first time. Since the district converted many full-time positions to part time in food services and transportation, insurance will be a valuable incentive to attract qualified applicants.

COMMENDATION

The district has added full medical benefits for part-time employees at no additional cost to the district.

Property and Casualty Coverage

The director of Human Resources administers the district's property and casualty insurance program.

SISD has had property and casualty coverage with ITT Hartford Insurance for the past three years. A competitive bidding process is performed every three years, with an option to review for a second and third year each year with the assistance of the district's insurance agent. The district carries insurance for property, auto physical damage, fleet liability, professional liability, general liability and employee dishonesty.

The district's property insurance policy is an all risk policy with blanket coverage at full replacement cost at the time of the loss. The auto physical damage coverage pays the actual cash value of damages to district vehicles and mobile equipment. SISD also has a boiler machinery comprehensive policy covering property damage directly involved with boiler machinery.

SISD's general liability coverage includes personal injury and employee benefits liability with a \$1 million per occurrence limit and \$1,000 per occurrence deductible. The professional liability insurance protects the district from negligent acts, errors, or omissions by board members and employees with a \$1 million limit per covered incident and a \$5,000 per

occurrence deductible. The fleet liability coverage includes bodily injury and property damages caused by the district's vehicles. The district acquired coverage for employee dishonesty or theft up to a limit of \$100,000 per incident in 1996.

The property values now listed in the endorsed property insurance coverage total about \$200 million. Newly built facilities and campuses are immediately included in the SISD property insurance policy.

The district now has the option of doing a request for proposals or competitive sealed bid, but it has elected to use the competitive bid process. The district's number of claims and incurred losses for all forms of property and casualty insurance have been minimal over the last five years.

FINDING

The Aquatics Center, which is open to the public and a part of school related activities, is covered through the district's \$1 million general liability policy. General liability insurance provides protection against claims arising from injuries to others or damage to the property of others for which the insured is held responsible.

Liability companies consider public pools to be a very high risk. In addition to the normal risks associated with a public pool, the review team identified several unique structural aspects that increase SISD's risk exposure. Inside the center, the non-slip floor in the construction plans was not installed in an effort to cut costs. Instead, the surface of the cement floor was painted with a non-slip material that eventually will peel off. In addition, the Aquatic Center has many windows near floor level. A serious accident could occur if someone slips on the floor and falls through a window.

Cases involving negligence leading to personal injuries can result in awards and legal fees higher than \$1 million. However, the district believes its \$1 million policy is sufficient to cover any possible claims since it is protected by governmental immunity in the event of an accident. A previous ruling by the Attorney General found that governmental immunity may protect SISD from state litigation but not from federal suits or criminal charges.

Neither the director of Human Resources nor the coordinator of Aquatics Activities has fully explored whether the district needs additional liability coverage for the center. Nor has a comprehensive safety plan been established to ensure that every possible precaution is taken to minimize

the possibility of accidents at the facility. Staff has been trained on the alarm system and basic water safety.

Recommendation 58:

Explore the need for increased insurance coverage at the Aquatics Center, and put a comprehensive safety plan in place to reduce potential liability.

The district should fully evaluate the limits of its immunity, and whether additional insurance coverage is needed to protect it from possible lawsuits. The director of Risk Management should take the lead in assessing the risk factors involved and establishing the comprehensive safety plan to minimize risks. Where possible, future agreements with other entities that may use the facility, such as the City or area hospitals, should include a provision to transfer or limit potential liability from the district to the entity.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Risk Management and the director of Human Resources assess the risk factors at the Aquatics Center and determine whether additional insurance coverage is needed.	April 1998
2.	The director of Risk Management, in coordination with the director of Human Resources, establishes a comprehensive plan to reduce risk factors and establish procedures to minimize risk at the center.	May 1998

FISCAL IMPACT

This recommendation can be implemented without cost to the district .

Chapter 7

CASH MANAGEMENT

CURRENT SITUATION

Solid cash management is a basic financial function that involves cashflow forecasting, cashflow management, the investment of surplus cash, and the maintenance of sound banking and investment relationships.

A sound cash management process strives to provide adequate cash for operations, both short and long term. It also should ensure the effective use of school funds at all times; establish accountability for cash receipts; and provide adequate safeguards until the district's funds are deposited. Cash managers also must maintain adequate bank balances to guarantee proper bank relations, and conduct detailed cash-flow analysis to identify investment opportunities that provide the highest possible return for the district. Finally, the cash management area should maintain adequate cash records.

The assistant superintendent of Finance is responsible for SISD's cash management duties. Board policy includes a list of the types of authorized investments that the district can make, including collateralized mortgage obligations issued directly by a federal agency; certificates of deposit; fully collateralized repurchase agreements; money market and no-load mutual funds; and public funds

investment pools. The policies emphasize safety of principal, liquidity, investment diversification, and high yields.

The district invests in three investment pool funds: Lone Star Liquidity Plus, Lone Star Government Fund, and TexPool. Liquidity Plus is a net asset value fund, while TexPool is a constant dollar fund. Both are highly liquid. Unlike TexPool and Liquidity Plus, the Government Fund is designed for longer-term investments and is less liquid.

The yield from TexPool was higher than the Liquidity Plus fund during the months of August through November 1997. The Government Fund, with its greater risk and lower liquidity, had slightly higher yields during this period.

FINDING

Norwest Bank holds the district's current bank depository contract. The district's board of directors approved a two-year contract renewal with Norwest Bank in November 1997. The district maintains eight checking

accounts and 23 student activity accounts at Norwest. Norwest Bank pledges collateral to cover all balances maintained by the district.

All of the district's checking accounts earn guaranteed annual interest rates of 4.0 percent. However, the bank credits district accounts with excess earnings above this amount through overnight repos, based on the prior month's 91-day Treasury Bill auction rate. **Exhibit 7-5** shows the overnight repo interest rates, along with the rates from the district's investment pool accounts for the month of August, 1997.

Exhibit 7-5

SISD Bank and Investment Accounts

August 1997

Financial Entity	Account Type	Number of Accounts	Interest as of 8/31/97	Balance as of August 1997
Norwest	District Checking	8	1.76%*	\$ 2,978,405
Norwest	Student Activity	23	1.76%*	\$788,151
Texpool	Investment Pool	4	5.60%	\$195,620
Lone Star Pool	Government Fund	3	5.77%	\$3,255,990
Lone Star Pool	Liquidity Plus	4	5.53%	\$4,251,932
Norwest	Overnight Repos	1	5.125%	\$2,195,700

*Interest rate provided by the district's previous depository contract. Source: Accounting Office - Data Templates and Bank Statements

Banking fees for such services as account maintenance, stop payments, and wire transfers, are paid by the interest earned by balances in the district's accounts. Interest earnings from balances above the level needed to cover monthly charges (compensating balances) are deposited into the district's accounts. TSPR examined the district's average daily balance in all checking accounts from October 1996 through September 1997. The average compensating balance required to cover monthly banking fees

was found to be approximately \$750,000. Balances above this level earned 5.1 percent annual interest in August, 1997, while the amount that could have been earned in investment pool accounts ranged from 5.5 to 5.8 percent.

SISD is not maximizing its investment earning potential. A review of the average daily balance in all of the district's checking accounts is shown in **Exhibit 7-6**.

Exhibit 7-6

Average Daily Balances in District Checking Accounts

August 1997

Date	Amount
8/1/97	\$2,551,252
8/4/97	\$3,077,670
8/5/97	\$3,479,736
8/6/97	\$3,363,680
8/7/97	\$3,288,656
8/8/97	\$2,930,745
8/11/97	\$2,838,136
8/12/97	\$2,115,352
8/13/97	\$1,436,974
8/14/97	\$7,125,730
8/15/97	\$2,362,803
8/18/97	\$2,105,697
8/19/97	\$2,025,982
8/20/97	\$1,998,767
8/21/97	\$1,938,678
8/22/97	\$3,016,065
8/25/97	\$3,266,903
8/26/97	\$2,228,643

Source: Neal & Gibson

This cash flow projection statement is used to project cash inflows and outflows to determine the amount of excess cash available for investment, on both short- and long-term bases. The projection is updated daily for actual cash inflows and outflows and the estimate of future excess cash is adjusted accordingly. The assistant superintendent of Finance uses an annual cash flow forecast but not a monthly or daily forecast.

Recommendation 59:

Perform cash forecasting on a daily and monthly basis and sweep more money into higher-yield investments.

The district should perform daily cash forecasting to ensure that all excess funds are invested in accordance with the board's stated objectives.

When the district renegotiates its depository contract in 1999, it should place more responsibility on the bank for sweeping excess funds into higher-yield instruments on a daily basis.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent of Finance develops cash forecasting procedures to determine cash available for overnight and long-term investing.	May 1998
2.	The assistant superintendent of Finance implements cash forecasting procedures and begins transferring idle cash to higher-yield investments on a daily basis.	June 1998

FISCAL IMPACT

By investing balances above \$750,000 into investment pools on a daily basis, the district will increase its annual interest income by at least .5 percent, or \$12,100.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Sweep more money into higher-yield investments.	\$12,100	\$12,100	\$12,100	\$12,100	\$12,100

FINDING

The district regularly receives checks as payment for rent for facilities and bus transportation for local charities. These checks are deposited periodically by the supervisor of Accounts Payable, usually on a weekly basis. An analysis of the last year's deposits showed that the district often leaves checks on the school premises for four to five days. The average amount of the checks kept at the school is about \$32,000; one check deposited last year was for \$427,979.

Although checks are kept in a vault in the Finance area and logged in at the time they are received, it is safer to deposit them on a daily rather than weekly basis. Such a practice limits the potential for misplacing checks, while earlier deposits increase interest earnings.

Recommendation 60:

Deposit checks on a daily basis to tighten financial controls.

The Accounts Payable supervisor should make arrangements for depositing checks within 24 hours of receipt.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Accounts Payable supervisor prepares daily deposits and arranges for armor services to pick them up daily.	April 1998
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FISCAL IMPACT

This recommendation can be implemented with available district resources. Although additional interest income will result, the exact amount could not be calculated.

Chapter 7

TAX COLLECTIONS

An efficient tax collection system that produces a high and expedient collection rate is essential to efficient district operations. In SISD, local property tax revenues provided almost 25 percent of its total revenue for 1996-97. These revenues come in primarily during December and January of each year. In the 1996-97 school year, SISD's property tax rate was \$1.47 per \$100 valuation, yielding a total adjusted 1996-97 tax levy of about \$26.1 million.

FINDING

Since 1988, the district has contracted with the City of El Paso to assess and collect its property taxes. The City of El Paso collects taxes for 20 jurisdictions, including the County of El Paso, El Paso ISD, Ysleta ISD, El Paso Community College, and El Paso County Hospital District.

Exhibit 7-8 summarizes SISD's contractual relationship with El Paso.

Exhibit 7-8

SISD Tax Collection Provisions with the City of El Paso

Service	SISD
Type of tax statement provided to taxpayers	Consolidated
Reporting frequency regarding total taxes collected	Available on a daily basis
Number of hours after collection to turn money over to district	During peak periods-December 15 through January 31- money is wire-transferred at least three times weekly (Monday, Wednesday, and Friday). In other periods, money is transferred weekly or more frequently if collections total more than \$800,000. However, in practice, the city deposits money daily during peak periods.
Prepare tax collection activity budget	Yes
Collection fee	Actual costs

Payment frequency	Monthly
Advisory board membership	Jointly appoint a member that serves with mayor, county judge, city council member, county commissioner, and others.
Collection of delinquent taxes	City may contract with an attorney to collect delinquent taxes.

Source: SISD tax collection contract

Since 1980, the City of El Paso has contracted with a law firm to collect delinquent taxes. On July 1 of every year, the city turns its delinquent tax roll over to the law firm to begin the collections process. The law firm reviews the delinquent tax roll to determine the validity and age of the obligation and whether the delinquent account is already being litigated. After reviewing the report, the firm uses the following methods:

Telecollections. Used when an account is not targeted for immediate lawsuit. Delinquent tax payers with obligations of \$5,000 or less are contacted by phone first.

Mailings. The law firm sends letters to delinquent taxpayers based on an annual mailing schedule to notify them of the firm's intent to sue if the account remains unpaid.

Lawsuits. A lawsuit ensues only after the telecollection and mailing efforts fail.

The City of El Paso defers taxes for taxpayers 65 years and older who owe delinquent taxes. It also ensures that these homeowners have applied for the 65-and-over homestead exemption.

Taxpayers send payments collected by the law firm directly to the City of El Paso, which in turn distributes the money among the appropriate entities, including the attorney's fees.

SISD's delinquent tax collections as a percent of the total tax levy is lower than Ysleta ISD's but substantially higher than Pharr-San Juan-Alamo and Edinburg ISD (**Exhibit 7-9**).

Exhibit 7-9

Delinquent Tax Collection Rates

SISD versus Area Peer Districts

Description	Socorro	Ysleta	Pharr-San Juan- Alamo	Southwest	Edinburg
Percent of Fiscal 1996 Taxes Collected as of August 31, 1997	96.43%	97.64%	89.31%	92.31%	90.48%
Delinquent Tax Accounts Receivable as of August 31, 1997	\$2,528,160	\$5,000,560	\$5,798,611	1,318,073	\$5,970,161
Fiscal 1996 Total Tax Levy	\$26,098,563	\$63,034,416	\$16,228,774	5,405,111	\$21,311,858
Delinquent Tax Accounts Receivable as a percent of Total Tax Levy	9.69%	7.93%	35.73%	24.39%	28.01%

Source: Peer 1996-97 annual financial reports

According to a tax deputy administrator with the City of El Paso, the

primary reason for SISD's results is that the district contains lower-income neighborhoods than its neighboring districts. The southeast part of SISD's district includes the Horizon City and Sparks colonias, extremely poor areas.

Based on TSPR interviews, the district has expressed satisfaction with the tax collection efforts of the City and the law firm handling delinquent taxes. The City, in its contract with the law firm, has established aggressive policies and procedures for collecting delinquent taxes. Several law suits, for example, are pending, and foreclosure proceedings occur on a regular basis when other collection methods fail.

An advisory board has been established with membership from the mayor, county judge, city council, county commissioner, and other representatives from the 20 taxing jurisdictions in El Paso County. This board only meets when there are problems; no meetings have occurred for the past three years.

COMMENDATION

SISD is participating in a cooperative tax collection effort with the City of El Paso that is working well and providing a high level of services to the district and its taxpayers.

Chapter 7

FIXED ASSET MANAGEMENT

CURRENT SITUATION

Capital asset expenditure planning and control are critical to the long-term financial health of any school district. Generally, expenditures for capital assets require significant financial resources; decisions are difficult to reverse, and the investment affects district financial performance over a long period of time. As of October 1997, SISD's capital assets totaled \$191 million (**Exhibit 7-10**).

Exhibit 7-10

Capital and Fixed Assets

October 1997

Land	Building	Construction in Progress	Furniture & Equipment	Balance as of October 1997
\$14,401,656	\$140,036,977	\$19,482,976	\$16,853,251	\$190,774,860

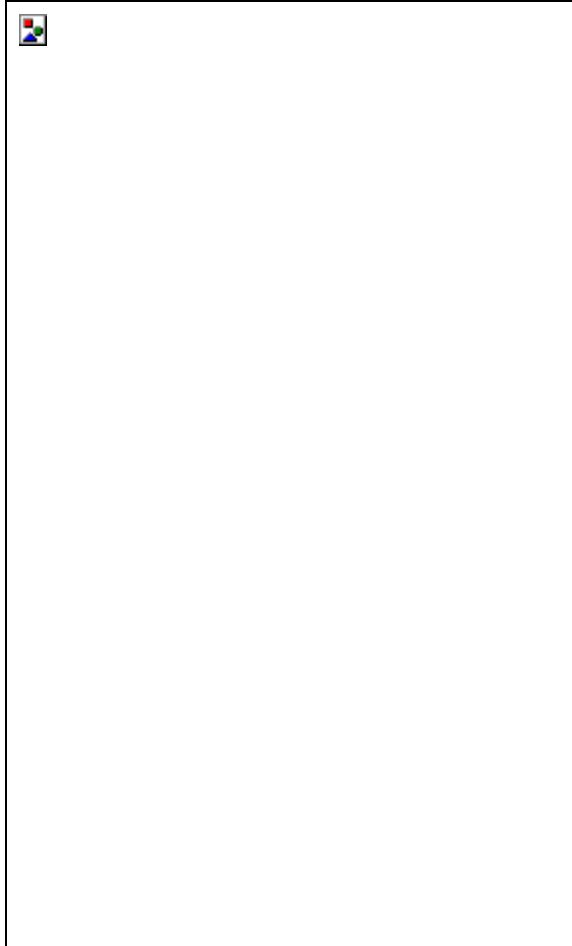
Source: SISD Data Templates

A fixed asset is defined by SISD as an asset that costs more than \$100 and has a useful life of more than three years. SISD's fixed-asset program is administered as a joint effort between the Warehouse Department and the Finance Department. **Exhibit 7-11** outlines the district's fixed-asset process.

Exhibit 7-11

Fixed-Asset Process Flow

1997-98



Source: Department interviews

The district prepares annual inventories sometime during the year and reconciles them at the end of each fiscal year. The annual inventories are performed by principals and supervisors, and the fixed asset accountant spot-checks their efforts (**Exhibit 7-12**).

Exhibit 7-12

Fixed-Asset Inventory Process Flow

1997-98



Source: Department interviews

All obsolete fixed assets are forwarded to the warehouse. Periodically, the warehouse holds an auction to sell obsolete fixed assets. Assets not found during the physical inventory process, but still recorded on the fixed-asset ledger, are reported as stolen. A police report is filed and the asset is removed from the inventory.

The most recent inventory was reconciled to the fixed-asset general ledger with less than a 3 percent variance.

FINDING

As described in the fixed-asset process flow in **Exhibit 7-11**, the Warehouse receiving staff manually prepare a document recording each asset purchase. This form is forwarded to the campus or facility receiving the asset for a signature acknowledging receipt. Campus or facility personnel then forward the form, which includes an asset number, a description of the asset, the amount of purchase, and its location, to the fixed-asset accountant for manual entry into the district's computer system. This process requires a significant amount of manual entry.

The bar-coding system recommended for tagging textbooks in the Purchasing and Distribution chapter of this report could be used to automate this process. SISD is researching new software to replace its Pentamation system. The latest accounting systems on the market offer integrated purchasing and receiving and fixed-asset systems that could automate many processes SISD currently performs manually. Due to the amount of data entry involved, most districts employ a fixed-asset clerk,

rather than a staff accountant, to enter information into the fixed-asset system.

Other districts also often use bar-coding systems to label new purchases with a hard tag. The tag number affixed to the fixed asset is entered into the fixed-asset system, allowing physical inventories to be performed quickly and efficiently with a bar code reader that automatically logs the fixed-asset number. These numbers can be quickly located on the fixed-asset system. This process makes it considerably easier to reconcile physical inventories to fixed-asset records.

Recommendation 61:

Place a bar code on all fixed assets and replace the fixed-asset accountant with a fixed-asset clerk.

The fixed-asset system should provide an interface between the purchasing and warehousing systems and automatically update the fixed-asset system as assets are acquired.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent of Finance includes specifications for an integrated purchasing, receiving, and fixed-asset system in the district's request for proposals for new software.	November 1998
2.	The new accounting system is installed, including an integrated purchasing, receiving and fixed asset system. Fixed assets are tagged and the accountant position is replaced with a fixed-asset clerk.	January 1999

FISCAL IMPACT

The bar-coding system as recommended in the Purchasing and Distribution chapter of this report can also be used for fixed assets. The cost of an automated interface between the requisition/purchase system and the fixed-asset system would be included in the purchase of the new system that replaces Pentamation. In most new integrated accounting systems, this type of interface is standard and should not entail additional costs. The metal bar-code tags will cost about two cents per tag, or about \$2,200 for the first year, and \$400 per year thereafter.

The interface between the requisition/purchase system and the fixed-asset system should allow the Finance Department to replace the fixed-asset accountant, who earns an annual salary of approximately \$42,000 including benefits, with a fixed-assets clerk at an annual salary of approximately \$21,800 including benefits, for a net annual savings of \$20,200. The system would allow the district to track its fixed assets more easily and deliver new equipment more quickly to schools and departments.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Purchase a bar-coding system.	(\$2,200)	(\$400)	(\$400)	(\$400)	(\$400)
Replace the fixed-asset accountant with a fixed-asset clerk.		\$20,200	\$20,200	\$20,200	\$20,200
Total Savings (Costs)	(\$2,200)	\$19,800	\$19,800	\$19,800	\$19,800

FINDING

The district's policy for general fixed assets requires expenditures for tangible items with a useful life of more than three years and a unit cost of \$100 or more to be classified in the general fixed-assets group of accounts. The Texas Education Agency's *Financial Accountability System Resource Guide* requires districts to capitalize all assets with a cost of more than \$5,000. The district's policy of recording assets with a dollar value of \$100 or more entails a costly and time-consuming number of additions and deletions to the general ledger system for transfers, purchases, and sales of assets.

The review team found that the data in SISD's fixed-assets inventory include items with values as low as \$14, as well as many assets listed as having zero value.

Recommendation 62:

Establish a board policy for the capitalization of fixed assets with a threshold of \$5,000 and maintain a separate controllable inventory listing of less-expensive items.

From an administrative standpoint, entry of items to the accounting system would not change. Lower-cost assets would be tagged and inventoried,

which would maintain an effective internal control, but they would not be subject to sampling by the external auditor.

The district should consider which items valued at more than \$100 to include in the controllable inventory. For example, some furniture could be tagged and inventoried, especially those items that can easily be stolen. Items valued at less than \$100 should be purged from the system. Those items listed with \$0 values should be researched to determine their values. If these items were donated to the district, they should be carried at book value.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent of Finance drafts a policy for the capitalization of fixed assets.	June 1998
2.	The board reviews and approves the policy.	July 1998
3.	The fixed-asset accountant updates fixed-and controllable-asset inventories and reconciles the inventories to the fixed-asset and controllable-asset ledger.	September 1998

FISCAL IMPACT

No fiscal impact would result from the adoption of this board policy. Raising the threshold for capitalizing fixed assets to \$5,000 could reduce external audit fees somewhat, since there would be fewer items to sample.

Chapter 8

PURCHASING AND DISTRIBUTION

This chapter examines the functions and activities of SISD's Purchasing, Warehouse, and Print Shop Departments and its textbook and library book delivery systems in four sections.

- A. Purchasing
- B. Warehousing and Mailroom
- C. Textbook and Library Book Delivery
- D. Print Shop Department

School district purchasing and distribution functions must acquire goods and services at the best price, at the right time, and in the right quantity, in the most efficient and effective way possible; ensure compliance with local, state, and federal regulations; and identify opportunities to cooperatively purchase goods with other jurisdictions when it is mutually beneficial to all parties involved.

Distribution includes the receipt, storage, and distribution of a wide variety of goods ranging from school supplies and textbooks to vehicle parts. Large inventories of goods are expensive to maintain, but the distribution function must ensure the availability of materials and supplies for teachers and students. The distribution function must minimize its inventory of needed supplies and materials while maximizing the availability of these supplies.

SISD has made great strides in improving the overall efficiency of its purchasing and distribution functions. Over the last few years, the district has implemented an automated purchasing system and reduced warehouse inventories. However, SISD should further improve its automated purchasing system with the software that replaces the current Pentamation system, and reduce inventory levels further by adopting new inventory policies and acquiring an automatic reorder point system. SISD should consolidate its purchasing and distribution functions into one department; place the management of the Warehouse Department under one supervisor; and develop and use key performance measures in managing these functions. Other recommendations include participation in cooperative purchasing programs, further automation of textbook distribution and collection, and automation of the Print Shop.

BACKGROUND

Competitive procurement methods outlined by the Texas Education Code must be used for all school district purchases valued at \$25,000 or more

(exceptions are purchases of vehicle fuel and produce). For example, if the district purchases \$25,000 of materials during one year, the district must use one of the procurement methods listed in **Exhibit 8-1**. School districts can select from one of these eight methods to procure goods and services.

Exhibit 8-1

Competitive Procurement Methods

Purchasing Methods	Description
Competitive bidding	Requires that bids be evaluated and awarded based solely upon bid specifications, terms and conditions, and bid prices.
Competitive sealed proposals	Requires the same terms and conditions as competitive bidding, but allows changes in the nature of a proposal and prices after proposal opening.
Request for proposals	Furnishes a mechanism for the competitive sealed proposal process that generates the receipt of competitive sealed proposals and contains several key elements, including newspaper advertisement, notice to proposers, standard terms and conditions, special terms and conditions, scope of work, acknowledgment form/response sheet, felony conviction notice, and contract clause.
Catalogue purchase	Provides an alternative to other procurement methods for the acquisition of computer equipment, software and services only.
Interlocal contract	Provides a mechanism for agreements with other local governments, the state, or a state agency to perform governmental functions and services.
Design/build contract	Outlines a method of project delivery in which the school district contracts with a single entity to take responsibility for both the design and construction of a project.
Job order contracts	Provides for the use of job order contracts for minor repairs and alternations.
Construction management contracts	Outlines the use of a contract to construct, rehabilitate, alter, or repair facilities using a construction manager.

Source: Texas Education Agency

The 1995 Texas Legislature expanded options for competitive

procurement to include design-build contracts, competitive sealed proposals, and requests for proposals for personal property and construction contracts. The Legislature added two more procurement methods in 1997, job order contracts and contracts using construction managers. State laws governing procurement for school districts have changed considerably over the last ten years (**Exhibit 8-2**).

Exhibit 8-2

Major Initiatives of Texas Legislative Session Impacting Procurement

1989 - 1997

Legislative Session	Impact on Procurement
1989	Increases limit for the mandatory use of competitive procurement methods to \$10,000.
1993	Increases limit for the mandatory use of competitive procurement methods to \$15,000 for construction services and to \$25,000 for personal property.
1995	Recodifies procurement regulations for school districts. Supplements competitive procurement methods with design-build contracts, requests for proposals for personal property and construction contracts, and competitive sealed proposals. Increases limit for the mandatory use of competitive procurement methods for construction services to \$25,000. Requires price quotations for the procurement of goods and services valued between \$10,000 and \$25,000.
1997	Supplements competitive procurement methods for construction services with job order contracts and contracts using construction managers. Defines terms relating to construction and explains methods for using competitive sealed proposals, design-build contracts, construction manger-agent contracts, and construction manager-at-risk contracts.

Source: Texas Education Agency

State regulations still prohibit the use of competitive bidding for certain types of professional services, including engineering, architectural, accounting, land surveying, and certain other services. School districts are required to obtain written or telephone price quotes from at least three suppliers for purchases valued between \$10,000 and \$25,000.

Chapter 8

PURCHASING

CURRENT SITUATION

The Purchasing Department is responsible for procuring goods and services that meet the needs of the district's students and staff while ensuring compliance with district policies and local, state, and federal regulations. The department's mission statement is *"to provide the best academic environment possible, serving the combined interests of our students, staff, faculty, and taxpayers of the Socorro Independent School District through the procurement of the best quality items and services, at the most economical price that meets the need."* The department's objectives are detailed in **Exhibit 8-3**.

Exhibit 8-3

Purchasing Department Objectives

Objective	Description
1	To buy at the lowest price, consistent with required quality and service.
2	To maintain continuity of supply, preventing interruption of the flow of materials and services to users.
3	To maintain specified material quality level, and a consistency of quality, which permits efficient and effective operations.
4	To develop reliable alternate sources of supply to promote a competitive atmosphere in performance and pricing.
5	To minimize the cost of acquisition by improving the efficiency of operations and procedures.
6	To ensure compliance with policy, regulation and statutes.
7	To hire, develop, motivate, and train personnel, and provide a reservoir of talent.
8	To develop and maintain good supplier relationships in order to create a supplier attitude and desire to furnish the District with new ideas, products, and better prices and service.
9	To achieve a high degree of cooperation and coordination with user departments.
10	To identify and/or develop new innovative and user friendly means to

obtain products and services, thus minimizing user product-search time while maximizing freedom of choice.
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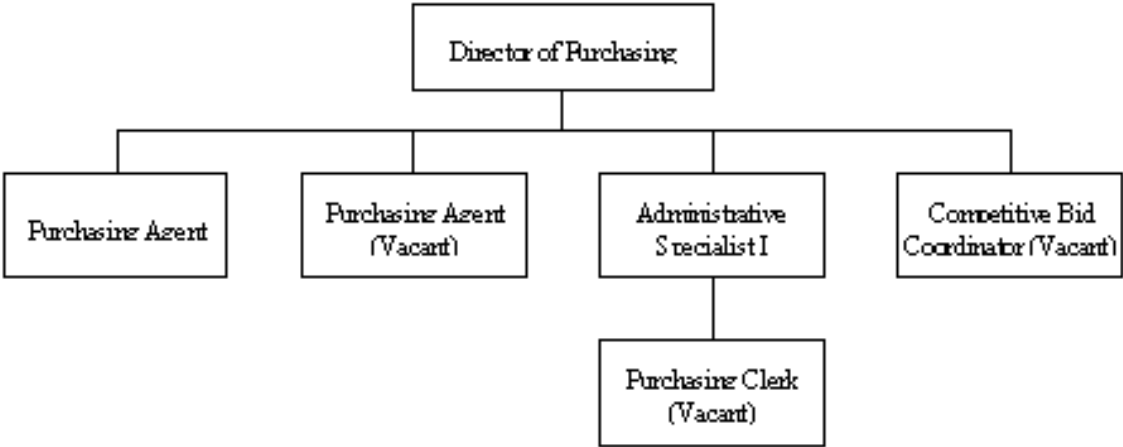
Source: Purchasing Department, SISD

The director of Purchasing supervises a purchasing agent and an administrative specialist. There are three other Purchasing positions that were vacant at the time of TSPR's review (**Exhibit 8-4**): purchasing agent, competitive bid coordinator, and purchasing clerk.

Exhibit 8-4

Organization

Department of Purchasing



For purchases valued at \$100 or more, district policy requires the use of its purchase requisition/purchase order process. For purchases of property valued between \$10,000 and \$25,000, district personnel either may purchase those items in accordance with the Texas Education Code (TEC) 44.031(a) 1-6 or follow the district's vendor list procedures in TEC 44.033(a-d). District policy requires the use of one of the competitive procurement methods described in the Texas Education Code for purchases valued at more than \$25,000.

The superintendent, assistant superintendent of Finance, director of Purchasing, and purchasing agent are delegated the authority to act as agents for the district in purchasing activities (**Exhibit 8-5**).

Exhibit 8-5

Purchasing Authority

Position	Limit of Purchasing Authority
Superintendent	Unlimited
Assistant Superintendent of Finance	Unlimited
Director of Purchasing	Unlimited
Purchasing Agent	Unlimited
Principal / Director	\$100
Assistant Principal	\$0
Manager	\$0

Source: Purchasing Department, SISD

Principals and directors are authorized to make individual purchases up to \$100.

The director of Purchasing manages the Purchasing Department and performs many line functions as well, such as processing purchase requisitions for secondary schools, assistant superintendents, and Support Services. The purchasing agent processes purchase requisitions from elementary schools, instructional departments, management information systems, and the Fine Arts Department. In 1996-97, Purchasing processed 8,472 purchase requisitions and 11,420 purchase orders.

To fulfill the competitive requirements for purchases valued at \$25,000 or more, SISD uses the General Services Commission (GSC) or the federal General Services Administration catalog purchasing programs, competitive bidding, and competitive sealed proposals. In the 1996-97 school year, SISD executed 895 catalog purchases, 63 competitive bids, and two competitive sealed proposals (**Exhibit 8-6**).

Exhibit 8-6

Number of Purchases by Method

1995-97

Method	1994-95	1995-96	1996-97
Blanket purchase orders	-	-	-

Competitive bidding	53	58	63
Competitive sealed proposal	-	3	2
Request for proposals	-	-	-
Catalog purchase	N/A	752	895
Inter-local contract	-	-	-
Design/build contract	-	-	-
Total	53	813	960

N/A = not available.

Source: Purchasing Department, SISD

TSPR's examination of a sample of SISD purchases of uniforms, temporary staffing services, air-conditioning accessories, beverages and snacks, and paper supplies indicate that SISD is following competitive procurement requirements.

Gilbane Building Co. was the district's top supplier by purchasing volume for 1996-97, followed by Silverton Construction and FHP (**Exhibit 8-7**).

Exhibit 8-7

Top Ten Suppliers by Dollar Purchasing Volume - All Funds

1996-97

Name	Type of Goods or Services	Location	Amount Paid
Gilbane Building Co.	Construction	El Paso, TX	\$15,558,732
Silverton Construction	Construction	El Paso, TX	6,080,408
FHP	Health insurance	EL Paso, TX	5,308,830
El Paso Electric Co.	Utilities	El Paso, TX	1,683,472
Hemphill Bus Sales, Inc.	Bus leases / purchases	Denton, TX	1,458,722

AccuStaff Temporaries, Inc.	Temporary staffing	El Paso, TX	1,190,748
Apple Computer, Inc.	Computers & technology	Chicago, IL	935,148
UTEP, Contracts & Grants	Pass-through agency fund	El Paso, TX	554,335
Sabredata	Technology support	Austin, TX	538,500
Total			\$33,308,895

Source: Purchasing Department, SISD

FINDING

As in many other districts, teachers at SISD supplement classroom instruction with instructional supplies offered through catalogs. The director of Purchasing discovered that purchases of certain specific instructional supplies called "manipulatives" totaled more than \$25,000 over a 12-month period and thus fell under competitive procurement requirements. To bring the district into compliance, the director of Purchasing developed an umbrella bid (a bid that consolidates the purchases of numerous catalog items under one bid) for catalog purchases of instructional supplies. While developing this arrangement, the director regularly consulted with the Texas Education Agency (TEA) and the Attorney General's Office on compliance issues. To evaluate these bids, the director of Purchasing assembled a team of 12 teachers and the bid coordinator. This team selected six primary suppliers and six secondary suppliers for instructional supplies. The umbrella bid for these supplies maintains teachers' freedom of choice to select from a variety of catalogs, while bringing the district into regulatory compliance and reducing purchasing costs (**Exhibit 8-8**).

Exhibit 8-8

Benefits from Umbrella Bid for Catalog Purchases

Description
Allows teachers freedom of choice.
Brought district into compliance with state procurement requirements.
Reduced the number of suppliers from 50 to 12 companies.
Significantly reduced warehouse inventory.

Reduced time for selecting products through supplier pre-selection.

Source: Purchasing Department, SISD

COMMENDATION

Purchasing has made good-faith efforts to comply with all laws and regulations, while providing SISD personnel with flexible purchasing solutions and soliciting their input in evaluating vendors.

FINDING

SISD's purchases fall into three main categories: purchased services, materials and supplies, and capital equipment. Purchases of professional and contracted services and materials and supplies have risen from \$12 million in 1992-93 to \$18.7 million in 1995-96, while capital outlay expenditures have fluctuated from \$13.8 million in 1992-93 to \$3.1 million in 1993-94 to \$22.3 million in 1995-96 (**Exhibit 8-9**), depending on the amount of construction in progress during any given year.

Exhibit 8-9

Trends in Purchases of Goods and Services

1993-96

Type	1992-93	1993-94	1994-95	1995-96
Professional and contracted services	\$4,370,560	\$7,140,372	\$5,816,999	\$6,619,695
Materials and supplies	7,717,879	8,381,094	9,181,486	12,118,346
Subtotal	\$12,088,439	\$15,521,466	\$14,998,485	\$18,738,041
Capital outlay	13,846,033	3,132,582	9,355,678	22,372,975
Total	\$25,934,472	\$18,654,048	\$24,354,163	\$41,111,016

Source: PEIMS

Audited financial information for 1996-97 was not available at the time of the review. Expenditures for materials and supplies increased by 57 percent from 1992-93 to 1995-96, while student enrollment grew by 20 percent during the same period (**Exhibit 8-10**).

Exhibit 8-10

Trends in Material and Supply Expenditures

1993-96

Category	1992-93	1993-94	1994-95	1995-96
6313 - Gasoline and other Fuels for Vehicles	\$270,962	\$240,849	\$225,035	\$260,653
6319 - Supplies for Maintenance and / or Operations	815,118	1,039,892	538,790	1,269,664
6332 - Textbooks	11,142	22,081	6,373	7,973
6339 - Testing Materials	88,922	79,960	53,285	77,458
6349 - Food Service Supplies	58,342	83,121	76,960	78,050
6351 - Food	1,379,470	1,508,892	1,544,665	1,675,946
6352 - Non-Food	154,472	116,079	100,309	216,455
6353 - Items for Sale	-	-	-	-
6354 - USDA Donated Commodities	257,689	215,762	261,121	183,978
6359 - Food Service Supplies	-	-	-	-
6399 - General Supplies	4,681,762	5,074,458	6,374,948	8,348,169
Total	\$7,717,879	\$8,381,094	\$9,181,486	\$12,118,346

Source: PEIMS

Items under general supplies (6399) include office supplies, general instructional supplies, printing services, software, and fixed assets under a unit value of \$5,000.

In 1995-96, Support Services established a preventive maintenance team and equipped it with a trailer, increasing expenditures in the category of supplies for maintenance and/or operations. The district also transferred \$2 million of expenditures for fixed assets under a unit value of \$5,000 from capital outlay to general supplies in 1995-96.

SISD has devoted relatively little attention to regional or multiregional cooperative purchasing programs. However, the district does participate in

GSC's Catalog Purchasing Agreement for computer equipment and buses and GSC's Cooperative Food Purchasing Program for food commodities. The district had no other cooperative purchasing agreements in place at the time of this review. However, the district is negotiating an agreement with Ysleta ISD to jointly purchase travel services. SISD also is pursuing a second agreement with the City of El Paso, the El Paso water utility, and El Paso County Community College for commonly purchased items such as office and janitorial supplies and office furniture.

Since 1995-96, United ISD has used cooperative purchasing programs extensively. United ISD is participating in the programs of the Regions I and II educational service centers for commodities such as paper products, teaching supplies, office supplies, furniture, and janitorial supplies, and in GSC's computer purchasing program. United was not yet able to provide the review team with quantifiable results, however they are convinced that participation in the program has reduced the cost of materials and supplies.

Recommendation 63:

Seek out and participate in opportunities to develop a regional or multiregional cooperative purchasing program.

The Purchasing Department should conclude its agreement with the City of El Paso, El Paso Water Utility, and El Paso County Community College and research the benefits of participating in other regional or multiregional cooperative purchasing programs for commonly purchased items.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The director of Purchasing identifies commodities that could be purchased more cheaply through a regional or multiregional cooperative purchasing program.	April 1998
2	The director of Purchasing evaluates the advantages and disadvantages of each program.	May 1998
3	The director of Purchasing develops a recommendation on participating in a regional or multiregional cooperative purchasing program and submits the recommendation to the Board of Trustees.	June 1998
4	The Board of Trustees approves the recommendation after any necessary changes.	July 1998

FISCAL IMPACT

By purchasing items such as office and janitorial supplies through cooperative purchasing programs, SISD should be able reduce expenditures. However, savings will be dependent on the district's level of participation.

FINDING

A common complaint among district personnel is that they must physically walk purchase requests through the Purchasing Department to ensure their completion. Because the Purchasing Department recently prohibited this practice, district personnel now call Purchasing personnel repeatedly to expedite the requisition process. A major part of the Purchasing secretary's responsibilities is to answer questions from district personnel about their purchase requests. The Purchasing secretary receives an average of seven such calls a day.

The Purchasing Department's software has been down for five business days so far during 1997-98, resulting in delays in the processing of purchase requests. Furthermore, the purchasing system provided through Pentamation is limited. The system cannot designate emergency purchase requests, which limits Purchasing's ability to prioritize requests from district staff. The purchasing system also lacks a mechanism for releasing encumbered funds. If a mistake is made in entering a purchase requisition into the software, available funds are tied up, thereby slowing down the purchase requisition process. During the annual inventory, the encumbrance mechanism in the purchasing system was down for two months, resulting in a backlog of 735 purchase requests that required two temporary employees a month to complete.

Recommendation 64:

Modify the request for proposals for the Pentamation replacement software to address problems in the purchase requisition and purchase order processes.

The director of Purchasing should review the request for proposals and ensure that SISD's purchasing problems are addressed by the new system.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The director of Purchasing identifies other problems in the purchasing requisition/purchase order process.	April - June 1998
2	The director of Purchasing discusses these problems and notential solutions with the technical assistance coordinator	June 1998

	in Strategic Planning.	
3	The technical assistance coordinator in Strategic Planning ensures that these problems are addressed in the replacement software for Pentamation.	June 1998
4	The director of Purchasing reviews and approves the plans for the replacement software for Pentamation.	July 1998

FISCAL IMPACT

Implementation of this recommendation will eliminate the need for the two temporary employees. Because these are temporary positions, potential savings resulting from this recommendation were not estimated by the review team.

FINDING

Although the Purchasing and Warehousing Departments have written missions and objectives, they do not use key performance measures to manage financial performance, cycle time, and service quality. A sample checklist of key performance measures for the purchasing and warehouse functions is provided in **Exhibit 8-11**.

Exhibit 8-11

Examples of Performance Measures

Type of Performance Measure	Sample Effectiveness and Efficiency Measures
Financial Performance	Purchase orders by amount Cost of operating the purchasing function as percent of total revenue Percent of total purchasing requisitions processed by the purchasing function Total purchases of goods as a percent of total budget Total purchases of services as a percent of total budget Total construction purchases as a percent of

	total budget
Cycle Time	<p>Average number of days to fill purchase requisitions</p> <p>Average number of purchase orders per Purchasing employee</p> <p>Total volume of purchases per Purchasing employee</p> <p>Total volume of purchases per professional (exempt) Purchasing employee</p>
Supplier Quality	<p>Number of active suppliers per Purchasing employee.</p> <p>Purchases per active supplier</p> <p>Cost of operating the purchasing function per active supplier</p> <p>Percent of total purchases spent with minority-owned suppliers</p> <p>Percent change in number of active suppliers during the one-year reporting period</p>

Source: Center for Advanced Purchasing Studies and Neal & Gibson.

Financial performance measures concern the level of expenditures necessary to operate the purchasing function given the number of purchase requisitions and purchase orders it processes. Examples include purchase orders by amount, the cost of operating the purchasing function as a percent of total revenue, and the percent of total purchase requisitions processed by the purchasing function. Cycle time measures, including average number of days to fill purchase requisitions, average number of purchase orders per Purchasing employee, and total volume of purchases handled by each purchasing employee, indicate how quickly purchasing and distribution departments perform their jobs. Finally, supplier quality measures indicate the number of suppliers managed by purchasing employees and the cost of doing business with the district's supplier base. Examples include the number of active suppliers per purchasing employee, purchases per active supplier, and the cost of operating the purchasing function per active supplier.

Performance measures provide benchmarks that allow management to evaluate its performance against other organizations. They provide averages and ranges characterizing the performance of the purchasing and distribution functions. This should lead an organization toward the changes needed to develop best practices and, ultimately, superior performance.

Recommendation 65:

Develop and use key performance measures to aid in managing operations.

While the Purchasing Department has a mission and objectives, performance measures need to be developed that will monitor the operating and financial performance of the department.

By calculating and analyzing key financial, cycle time, and supply quality performance measures on a regular basis, the director of Purchasing would be able to identify key variances and compare the performance of the department against purchasing functions in other organizations and better manage the department's operations. It is possible that some modifications to the replacement software to Pentamation will be needed to monitor these performance measures.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The director of Purchasing identifies the most appropriate performance measures for the Department of Purchasing and discusses any special software requirements with the technical systems coordinator.	April 1998
2	The director of Purchasing implements the tracking of any performance measures that do not require software modifications.	May 1998
3	The technical systems coordinator determines the key features of the replacement software for Pentamation that will be needed to track other measures.	July 1998
4	The director of Purchasing reviews and approves the plans for the replacement software for Pentamation.	June 1998
5	The director of Purchasing implements all performance measures when the new system is installed.	July 1999

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

Chapter 8

WAREHOUSING AND MAILROOM

CURRENT SITUATION

The Warehouse Department employs two supervisors and 13 support employees. The warehouse is located in the Support Services Center and has approximately \$1 million in inventory. The mailroom function includes one clerk and one carrier.

FINDING

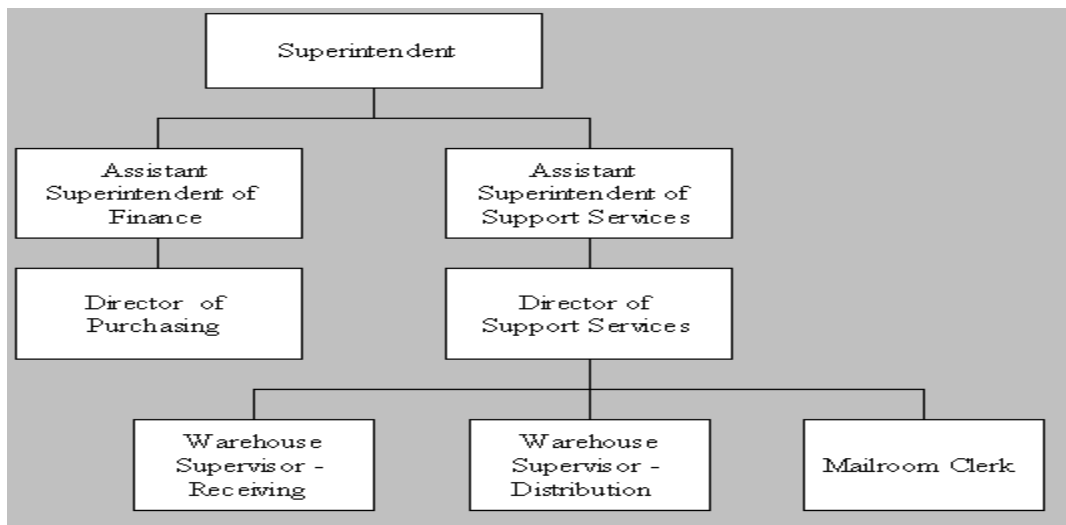
SISD's organizational structure divides its purchasing and distribution functions into two separate departments, resulting in duplicated effort and additional staffing costs.

The director of Purchasing reports to the assistant superintendent of Finance, while the supervisors of the Warehouse Department and the mailroom clerk report to the director of Support Services (**Exhibit 8-12**).

Exhibit 8-12

Organization

Purchasing and Distribution Functions



Source: Purchasing Department and Department of Support Services, SISD

Two supervisors manage the Warehouse Department. A mailroom clerk handles the shipment and receiving of internal and external district mail.

The warehouse supervisors manage the central warehouse and distribution operations. Their duties have been divided between receiving and distribution. The supervisor over receiving manages the receipt of materials and supplies, the warehouse budget, and the bid process for warehouse inventory. The supervisor over distribution manages the distribution of materials and supplies to district locations, warehouse administration and inventory control, textbook receipt and distribution, and salvage and surplus assets. The functions of all SISD Warehouse personnel are described in **Exhibit 8-13**.

Exhibit 8-13

Job Descriptions

Warehouse Department

Position	Job Descriptions	Supervisor
Warehouse Supervisors	Supervises the operation of the central warehouse and distribution operation. Recommends for replacement equipment not included in capital outlay budgets. Responsible for receipt and delivery of goods to the district. Trains, assigns work to, and evaluates department employees. Serves as resource in the preparation of bid specifications. Assists in the accountability and distribution of textbooks.	Director of Support Services
Data Processing Specialist	Performs data entry on warehouse inventory requisitions. Tabulates warehouse invoices and prepares purchase orders and/or payment authorizations. Runs necessary reports to assist in ordering inventory. Traces errors and records adjustments to correct charges/credits. Maintains complete and systemic set of records of warehouse payables. Reviews monthly budget printouts for outstanding purchasing orders.	Warehouse Supervisor
Receptionist / Clerk	Performs routine office work. Maintains records. Places and receives telephone calls and records messages. Maintains filing system. Performs bookkeeping tasks. Orders and maintains supplies as needed.	Warehouse Supervisor

Warehouse III	Trains staff members in receiving, distribution and inventory control. Supervises receipt, processing, and disbursement of materials and equipment at the central warehouse. Performs physical inventories of equipment and supplies. Maintains current records concerning stock levels, orders, backorders, deliveries and acquisitions. Records and tags fixed assets and district equipment.	Warehouse Supervisor
Warehouse III - Textbook Leadman	Responsible for directing a standardized program for the issuance and receipt of state-adopted textbooks and educational materials. Verifies accuracy of textbook shipments to and from state textbook depositories. Maintains accurate data and reports concerning new adoptions, payments for lost textbooks, surplus to quota and worn textbooks.	Warehouse Supervisor - Distribution
Warehouse II	Responsible for stocking, receipt, distribution and inventory control of incoming materials and equipment. Prepares paperwork and expedites transfers and pick-ups from schools and departments. Assigns and stocks items and rotates accordingly. Performs physical inventories. Assists in recording and tagging fixed assets, capital outlay, and district equipment. Assists in loading/unloading vehicles.	Warehouse Supervisor
Warehouse I	Assists in stocking, receipt, distribution, and inventory control of incoming materials and equipment. Delivers, transfers, and picks up supplies, equipment, and materials from schools and departments. Stocks items and rotates accordingly. Checks and unloads supplies, materials, and equipment, obtaining authorized signatures upon delivery. Performs physical inventories. Assists in recording and tagging fixed assets, capital outlay, and district equipment.	Warehouse Supervisor

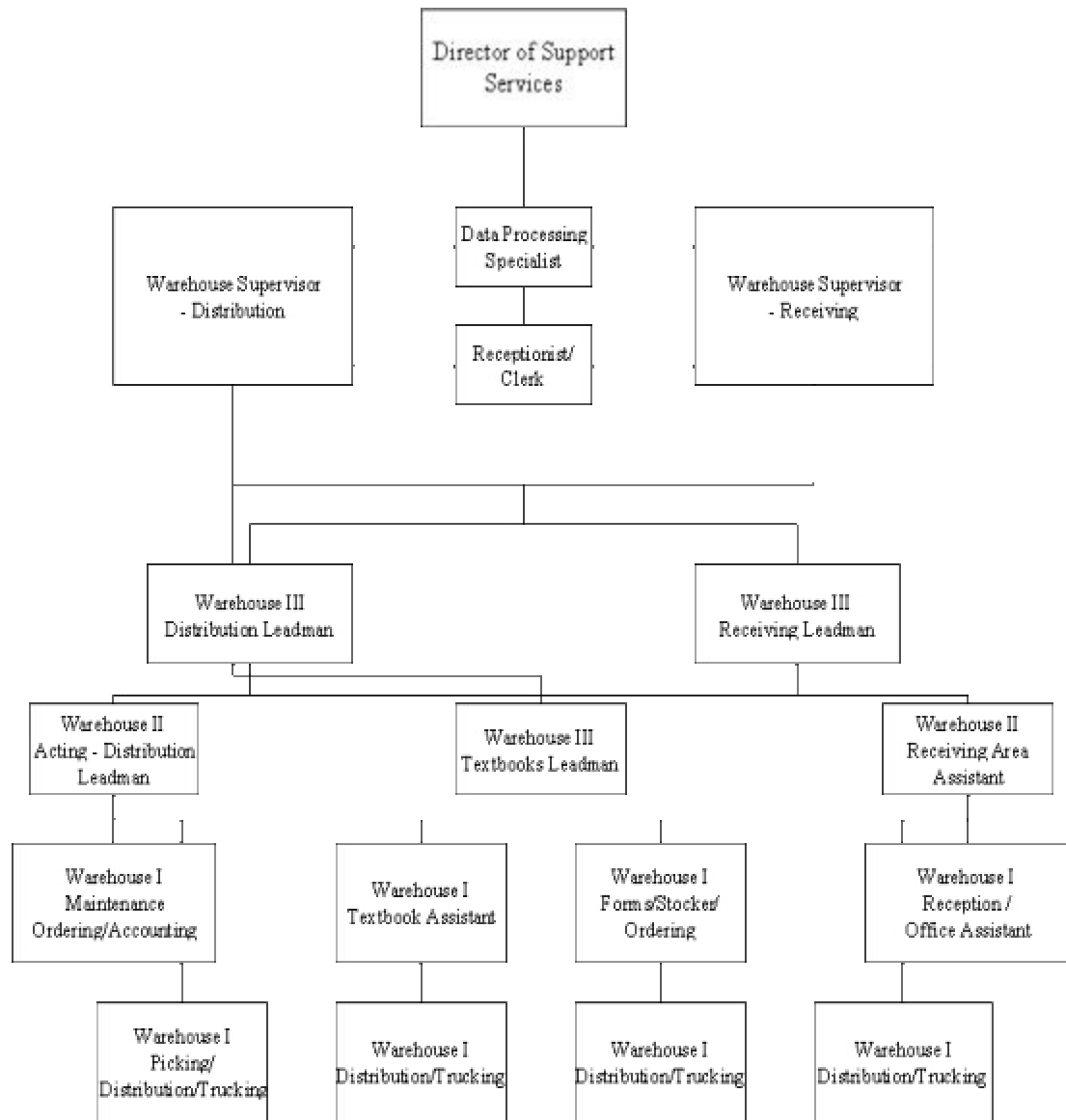
Source: Department for Administrative and Personnel Services and Warehouse Department, SISD

All employees in the Warehouse Department except the warehouse III-textbook leadman report to two supervisors (**Exhibit 8-14**).

Exhibit 8-14

Organization

Warehouse Department



Source: Warehouse Department, SISD

Warehouse I, II, and III staff members also spend approximately 5 to 10 percent of their time on completing hard-copy purchase requisitions that

are then entered into the purchase requisition system by the data processing specialist (**Exhibit 8-15**).

Exhibit 8-15

**Purchasing Requisition Functions Performed by
Warehouse Personnel**

Position	Purchasing Functions	Manual
Warehouse II Acting - Distribution Leadman	Submits purchase requisitions for office supplies, paper, printing supplies, and auto-visual equipment.	Yes
Warehouse II Receiving Area Assistant	Submits purchase requisitions for janitorial and cafeteria supplies.	Yes
Warehouse I Maintenance Ordering / Accounting	Submits purchase requisitions for grounds, maintenance, carpentry, electrical, plumbing supplies. Approved by warehouse supervisor - distribution or director of Support Services.	No
Warehouse I Forms / Stocker/ Ordering	Submits purchase requisitions for district forms and nursing supplies.	Yes

Source: Warehouse Department, SISD

Recommendation 66:

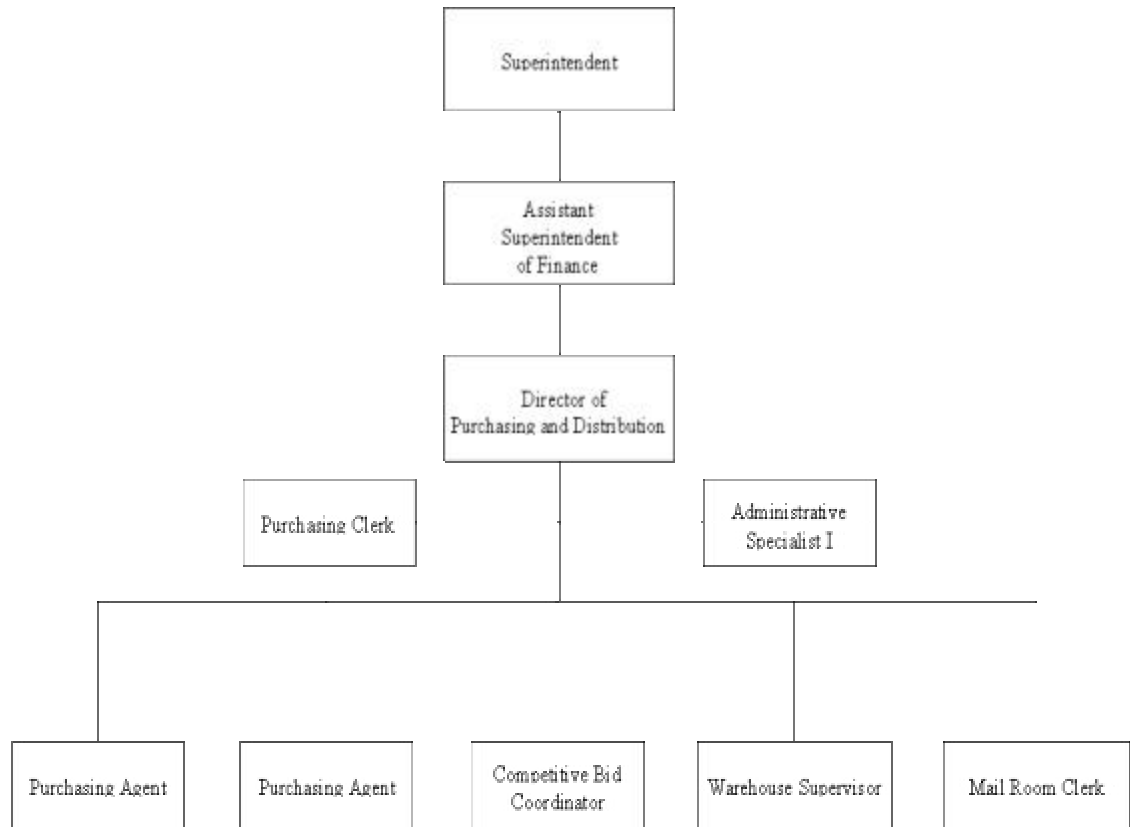
Consolidate purchasing and distribution functions in one department and place the management of the Warehouse Department under one supervisor.

The purchasing and distribution functions should be placed under the director of Purchasing, and the responsibilities for managing the Warehouse Department should be consolidated into one position. This position, along with the mail room clerk, should report to the director of Purchasing and Distribution (**Exhibit 8-16**).

Exhibit 8-16

Revised Organization

Purchasing and Distribution



Source: Neal & Gibson

The responsibilities of the warehouse supervisor over receiving, including managing the receipt of materials and supplies and the warehouse budget, should be delegated to the new warehouse supervisor. These responsibilities should include those detailed in **Exhibit 8-13**. The responsibility for coordinating the bid process for warehouse inventory should be delegated to a new purchasing agent. The processing of all purchasing performed by warehouse I and II staff members and the data processing specialist should be delegated to one of the two purchasing agent positions, making the position of the data processing specialist unnecessary (**Exhibit 8-17**).

Exhibit 8-17

Revised Responsibilities of Warehouse Supervisor and New Purchasing Agent

Position	Additional Responsibilities
Warehouse Supervisor	Manages the receipt of materials and supplies and the warehouse budget.
Purchasing Agent	Coordinates the bid process for warehouse inventory. Purchases all commodities for the warehouse.

Source: Neal & Gibson

The position of warehouse I - reception/office assistant should be eliminated and its responsibilities delegated to the office clerk in the Warehouse Department and the secretarial pool in Support Services.

SISD should attempt to reassign personnel whose positions are eliminated to other positions in the district.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The director of Purchasing develops a reorganization plan for the new Department of Purchasing and Distribution, incorporating the Purchasing Department, the Warehouse Department and the mailroom.	April 1998
2	The superintendent approves, with any necessary changes, the reorganization plan.	May 1998
3	The Warehouse Department and mailroom are incorporated into the Purchasing Department under the director of Purchasing.	July 1998
4	The assistant superintendent of Human Resources attempts to reassign district personnel affected by the reorganization plan to other positions in the district.	July 1998

FISCAL IMPACT

By eliminating one warehouse supervisor position, the district could save \$35,153 annually in salaries and benefits. Eliminating the positions of data processing specialist and warehouse I - reception/office assistant should save another \$41,841 in salaries and benefits. Overall savings to district are estimated at \$76,994 annually.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Consolidate purchasing and distribution functions	\$76,994	\$76,994	\$76,994	\$76,994	\$76,994

FINDING

The Warehouse Department has reduced its inventory level from \$2 million in 1994-95 to \$1 million in 1996-97 (**Exhibit 8-18**). Even so, much of its warehouse and transportation inventories are more than two years old, and inventory levels are still high.

Exhibit 8-18

Inventory by Dollar Volume

1994-97

	1994-95	1995-96	1996-97
Warehouse	\$1,959,571	NA	\$1,015,399
Transportation	26,453	NA	37,015
Total	\$1,986,024	\$1,428,026	\$1,052,414

NA indicates not available.

Source: Warehouse Department, SISD

In October 1997, SISD had slightly more than \$1 million in warehouse and transportation inventory. Forty-three percent of its warehouse inventory - in both units and value - is more than three years old. Essentially, the district has committed a large sum of money to inventory that is not being used, increasing the warehouse cost of maintaining these inventory items, and tying up financial resources (**Exhibit 8-19**).

Exhibit 8-19

Inventory Age

October 1997

	Warehouse	Transportation

Age	Number of Units	Value	Number of Units	Value
Less than one year old	128,867	\$365,579	3,588	\$20,137
Between 1 and 2 years old	68,130	132,699	137	1,577
Between 2 and 3 years old	28,814	80,322	1,856	15,301
More than 3 years old	175,258	436,799	0	0
Total	401,069	\$1,015,399	5,581	\$37,015

Source: Warehouse Department, SISD

The district has \$532,422 invested in inventory that is more than two years old. Compared with two of its peer districts, SISD maintains a large warehouse inventory. SISD maintains \$50 worth of inventory per student, while Laredo, which is similar in size, and Ysleta, which is in the area, have costs for inventory per student \$27 and \$26 respectively (**Exhibit 8-20**).

Exhibit 8-20

Inventory Comparison

Socorro and Selected Peer Districts

1996-97

Item	Socorro	Laredo	Ysleta
Inventory	\$1,052,414	\$624,266	\$1,249,305
Enrollment	21,098	22,987	47,366
Inventory per student	\$50	\$27	\$26

Source: Warehouse Department, SISD and selected school districts

Also, the Warehouse Department does not use automatic reorder points for

warehouse items. A reorder point is a minimum number of units of a particular commodity desired in warehouse inventory. By programming these points in a software system, a district's computer system can automatically generate purchase requisitions for items that reach the predetermined minimum level. Instead of using automatic reorder points, the Warehouse supervisor over distribution decides when to restock items.

In judging inventory levels, the review team analyzed selected inventory items with more than 2,500 units on hand. This analysis revealed that the warehouse had a 100-year supply of certain commodities

(**Exhibit 8-21**). Inventory items in stock at more than 1.5 times their annual usage are highlighted in bold type.

Exhibit 8-21

Warehouse Inventory Items with More than 2,500 Units

As of October 22, 1997

	Quantity		Annual	Over (Under) Annual Usage	
Description	On Hand	Item	Usage	Quantity	Value
Reams/Bond Paper Xerox 8 1/2 x 11	11,020	Ream	42,471	(31,451)	(\$63,846)
Wire #12 THHN Solid Blue	3,500	Foot	14,500	(11,000)	(35,310)
Thermal Masters 8" x 11" 411	15,890	BX	1,594	14,296	51,466
Ditto Master 8" x 11" 311 (H-8	9,987	BX	83	9,904	38,229
Reams/Business Paper 11 x 17 #20	2,811	Reams	629	2,182	10,255
Student Code of Conduct English	2,934	Each	7,160	(4,226)	(1,057)
Acetate Sheets	4,695	BX	201	4,494	9,078
X-Acto Knives	3,055	Each	1,061	1,994	1,954
Message Pads	14,745	Pad	3,383	11,362	1,818

Construction Paper 12 x 18 Dark Brown	2,618	PKG	508	2,110	1,772
Fastener, Brass with Spread PO	2,560	BX	471	2,089	1,358
Chalk White	3,600	BX	4,818	(1,218)	(646)
Clip (Small)	2,957	BX	7,221	(4,264)	(640)
Pencil #2	3,782	DZ	4,304	(522)	(407)
Art Tissue Asst. Color 20 x 3	3,224	PKG	3,505	(281)	(214)
Wire #10 THHN Stranded Green	2,500	Foot	5,500	(3,000)	(210)
HBJ A Friend Like You 1-2	2,916	Each	1,396	1,520	699
Soap, Hand Bar	2,862	Each	1,716	1,146	287
Wire #12 THHN Stranded Black	2,500	Foot	3,500	(1,000)	(50)
Wire #10 THHN Stranded Yellow	2,500	Foot	1,501	999	70
Wire #14 Solid Green	2,500	Foot	500	2,000	60
Wire #12 THHN Stranded Blue	2,500	Foot	1,500	1,000	50
Grade Books	2,567	Each	2,517	50	8
Total					\$14,726

Note: Commodities in bold indicate quantity more than 1.5 times annual usage.

Source: Warehouse Department, SISD

The warehouse has 9,987 boxes of ditto master, or 120 times the district's annual usage; 4,695 boxes of acetate sheets, or 23 times annual usage; and 15,890 boxes of thermal masters, or 9.9 times annual usage. Unnecessary inventory ties up district funds and requires additional labor costs for moving and counting it.

TSPR also found that SISD's process for completing purchase requisitions for inventory items is manually intensive (**Exhibit 8-22**).

Exhibit 8-22

Process for Reordering Warehouse Inventory

Person Completing Steps	Description of Steps
Warehouse Supervisor - Receiving	<ol style="list-style-type: none"> 1. Review inventory levels periodically. 2. Check on bids. 3. Complete paperwork for purchase requisitions for open bids. 4. Note the bid number on the paperwork. 5. Enter into the computer. 6. Print screen. 7. Deliver to director of Support Services for approval.
Director of Support Services	<ol style="list-style-type: none"> 8. Approve or return for revisions. 9. With approval, mail or fax purchase order to supplier.

Source: Warehouse Department, SISD

The Warehouse supervisor over receiving processes between five and ten purchase requisitions for warehouse inventory items per week; this takes an average of 10 minutes per purchase order.

Recommendation 67:

Purchase and install an automatic reorder point system and reduce warehouse and transportation inventory by establishing minimum and maximum inventory levels.

After establishing the minimum and maximum inventory levels for the warehouse, the district should sell surplus inventory items to recover some of its cost or give away items that it can not sell to nonprofit organizations in the community.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The Warehouse supervisor establishes minimum and maximum inventory levels for all inventory items and compiles a list of surplus inventory items, given the established inventory levels.	June 1998
2	The director of Purchasing, assisted by the warehouse supervisor, publishes a list of surplus inventory items and sells them at auction.	July 1998
3	The director of Purchasing gives items that cannot be sold to nonprofit organizations in the community.	July 1998
4	The purchasing agent, with the assistance of the Warehouse supervisor and the technical systems coordinator in Strategic Planning, assesses the automatic reorder point systems available for warehousing departments.	August 1998
5	The director of Purchasing, with the assistance of the purchasing agent and the technical systems coordinator, recommends the best available system to the assistant superintendent of Finance.	September 1998
6	The assistant superintendent of Finance approves, with any necessary adjustments, the recommendation.	September 1998
7	The automatic reorder point system is installed in the Warehouse Department.	October 1998

FISCAL IMPACT

With inventory policies and an automatic reorder point system, the district should be able to reduce its inventory level by approximately \$437,000, which is equivalent to the amount of warehouse inventory that is more than three years old. By selling surplus inventory items at 10 cents on the dollar, the district should generate an estimated \$43,700 (10 percent of \$437,000) in one-time revenue. The cost of an automatic reorder point system for inventory control is estimated at 1,500.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Purchasing and install automatic reorder point system	(\$1,500)	\$0	\$0	\$0	\$0
Reduce warehouse and	\$43,700	\$0	\$0	\$0	\$0

transportation inventory					
Total Savings (Costs)	\$42,200	\$0	\$0	\$0	\$0

Chapter 8

TEXTBOOK AND LIBRARY BOOK DELIVERY

CURRENT SITUATION

TEA selects and purchases most of the textbooks used by Texas school districts. TEA buys textbooks from the publishers and then lends them to school districts until new textbooks are selected by the district. Each district then is responsible for returning the borrowed textbooks to TEA. If textbooks are lost during the school year, the district must recover their cost from the students' parents. If payment from the parents is not received, the district must compensate the state for the loss directly.

In SISD, the warehouse III - textbook leadsman and warehouse I - textbook assistant is responsible for receiving and returning TEA's textbooks and for tracking their location. Typically, a school textbook clerk managed by an assistant principal at each school is responsible for distributing and collecting textbooks, recovering the cost of lost textbooks from parents, and storing textbooks that are not in use. The value and number of lost textbooks in SISD declined from in 1992-93 to 1995-96, but rose sharply in 1996-97 (**Exhibit 8-23**).

Exhibit 8-23

Lost Textbooks in SISD

1992-93 through 1996-97

Lost Textbooks	1992-93	1993-94	1994-95	1995-96	1996-97
Number	1,010	829	486	675	1,331
Value	\$21,410	\$21,944	\$13,115	\$8,198	\$42,832

Source: District Textbook Program, SISD

Almost 85 percent of the district's textbook losses in 1996-97 occurred in high schools. Montwood High reported the most losses-\$22,547-of all district schools (**Exhibit 8-24**).

Exhibit 8-24

Lost Textbooks by School

1996-97

School	Number Of Lost Textbooks		Value of Lost Textbooks	
	Amount	Percent	Amount	Percent
High Schools				
Montwood	671	50.4%	\$22,547	52.6%
Socorro High	203	15.2	7,298	17.0
Americas	192	14.4	6,541	15.3
Keys Academy	0	--	0	--
Total High Schools	1,066	80.1%	\$36,386	84.9%
Middle Schools				
Montwood	0	--	0	--
Salvador H. Sanchez	54	4.0	\$1,519	3.6
Socorro Middle	0	--	0	--
Walter E. Clark	58	4.4	1,506	3.5
William D. Slider	0	--	0	--
Total Middle Schools	112	8.4%	\$3,025	7.1%
Elementary Schools				
Benito Martinez	0	--	0	--
Campestre	23	1.7	438	1.0
Chavez	0	--	0	--
Escontrias ECC	0	--	0	--
Escontrias Elementary	24	1.8	567	1.3
H. D. Hilley	58	4.3	1,479	3.5
Helen Ball	0	--	0.00	--
Horizon Heights	22	1.6	394	0.9
Hueco	9	0.6	0	--
Myrtle Cooper	4	0.3	271	0.6
O'Shea Keleher	4	0.3	61	0.1

Robert Rojas	0	--	0	--
Sierra Vista	0	--	0	--
Vista Del Sol	13	0.9	211	0.5
Total Elementary Schools	153	11.5%	\$3,421	8.0%
Total	1,331	100.0%	\$42,832	100.0%

Source: District Textbook Program, SISD

The district's library program has a stated mission "to ensure that students and staff are effective users of ideas and information." As such, the program operates library media centers at each school with a total staff of 51 librarians, library assistants, and support personnel (**Exhibit 8-25**).

Exhibit 8-25

Staffing of SISD's Library Program

Category	Library Media Specialist	Support and Paraprofessional	Total
Elementary school	13	13	26
Middle school	4	4	8
High school	4	9	13
Other	1	3	4
Total	22	29	51

Source: Library Program, SISD

FINDING

The district's receiving process for new textbooks is manually intensive and requires duplicated effort. In 1997-98, the district processed 27,875 textbooks as a result of new adoptions. The district has hired four temporary employees for two months to hand-stamp a six-digit code in all textbooks received (**Exhibit 8-26**).

Exhibit 8-26

Textbook Distribution and Receiving Process

Person Completing Task	Description of Steps
Warehouse III - Textbook Leadsman	<p>1.Pre pares projections for textbook needs for next year based on course enrollment as recorded in PEIMS.</p> <p>2.Orders new textbooks from the Texas Education Agency (TEA) for next year, typically in April.</p>
Warehouse III - Textbook Leadsman	<p>3.Determines number of additional textbooks needed from TEA as a result of pre-registration.</p> <p>4.Orders additional textbooks from TEA as a result of pre-registration.</p>
Warehouse I - Textbook Assistant	<p>5.Receives textbook order from TEA with packing list.</p> <p>6.Verifies condition and number of textbooks in order.</p> <p>7.Signs and attaches packing list to notification list.</p>
Temporary Employees	<p>8.Manually stamps six-digit code in all textbooks from TEA.</p> <p>9.Replaces textbooks in box.</p>
Warehouse I - Textbook Assistant	<p>10.Enters textbook information into the district's computer system.</p>
Warehouse III - Textbook Leadsman	<p>11.Enters enrollment of each course for each school into the Distribution Database Report generated by the Hayes & Associates book processing Software.</p> <p>12.Calculates number of surplus or deficit textbooks for each course by school.</p> <p>13.Delivers report of expected textbook deliveries to the textbook clerk at each school.</p>
Warehouse I - Textbook Assistant	<p>14.Receives all surplus textbooks from schools.</p> <p>15.Checks the number and condition of all textbooks received from each school.</p> <p>16.Credits the records with the number of good condition textbooks received from each school.</p>

Warehouse III - Textbook Leadsman	17.Reconciles the number of lost textbooks for each school with assistant principal. 18.Returns surplus textbooks to TEA and requests any additional copies of textbooks from TEA.
Warehouse I - Textbook Assistant	19.Delivers any additional textbooks to all schools.

Source: District Textbook Program, SISD

Although the Warehouse Department has already stamped textbooks with the six-digit code, Montwood High School (with a 1996-97 enrollment of 2,723 students) places bar-code labels on all textbooks for its own bar-coding textbook system.

All secondary schools distribute their textbooks directly to students. However, as indicated in **Exhibit 8-27**, most schools track textbooks manually, using file cards. Socorro High School is installing the Hayes Textbook System, which is a computerized textbook tracking system. Slider Middle School is also considering the Hayes System.

Exhibit 8-27

Type of Distribution and Collection System by School

1996-97

School	Form of Data Entry	Form of Distribution
High Schools		
Montwood	Electronic using bar coding on Library System	Directly to student
Socorro High	Manual on Hayes Textbook System	Directly to student
Americas	Manual on textbook card	Directly to student
Keys Academy	Manual on teacher list	Directly to student
Middle Schools		
Montwood	Manual on textbook cards	Directly to student
Salvador H. Sanchez	Manual on textbook cards	Directly to student
Socorro Middle	Manual on textbook cards	Directly to student

Walter E. Clark	Manual on textbook cards	Directly to student
William D. Slider	Manual on textbook cards	Directly to student
Elementary Schools		
Elementary schools	Manual on textbook cards	To student via teacher

Source: Warehouse Department, SISD

Interestingly, Montwood High School, the only school with a centralized electronic data entry system for its textbooks, accounted for 52.6 percent of these losses. The district, however, reports that these high losses at Montwood were not due to a lack of or improper use of the system itself, but were more attributable to the replacement of three textbook clerks during that year.

As indicated in **Exhibit 8-28**, the textbook distribution and return process at most high schools and middle schools is manually intensive. The textbook clerk at each school has to manually write each student's name, student identification number, book number, teacher's name, title, room number, course number, period, and semester on the textbook card. All of this information already has been entered into the district's computer system during student registration. The school textbook clerk also must manually verify the return of textbooks from all subjects.

Exhibit 8-28

Textbook Distribution and Return Process

Middle and High Schools

Person Completing Task	Description of Steps
School Textbook Coordinator	<ol style="list-style-type: none"> 1.Prepare annual textbook inventory report, including number of lost and damaged textbooks and the number of additional textbooks needed for next year, typically in June. 2.Forwards the annual textbook inventory report to warehouse I - textbook leadsman. 3.Compares the number of textbooks in the school's book room with the quota for the textbook and the number of students

	<p>enrolled in a subject.</p> <p>4.Orders additional or returns excess textbooks from/to warehouse I - textbook leadsman.</p>
School Textbook Clerk	<p>5.Receives and organizes textbooks received from warehouse I - textbook leadsman in units of five.</p> <p>6.Pre pares for distribution of textbooks to students.</p>
School Textbook Clerk	<p>7.Distributes textbooks to each student and, at the same time, writes the student's name, student identification number, book number, teacher's name, title, room number, course number, period, and semester on the textbook card.</p> <p>8.Returns undistributed textbooks or requests additional textbooks from the warehouse I - textbook leadsman.</p>
School Textbook Clerk	<p>9.Takes up textbooks from students either before test day or at the beginning of class on test day.</p> <p>10.Returns textbook or lost textbook cards to the book room.</p>
School Textbook Clerk	<p>11.<i>Manually verifies return of textbooks for all subjects.</i></p> <p>12.Organizes the textbooks in units of five in the book room.</p> <p>13.Generates lost textbook report identifying students that have not returned textbooks and provides report to main office for entering into student computer records.</p> <p>14.Packages any surplus textbooks for delivery to the Warehouse Department.</p>
School Textbook Coordinator	<p>15.Determines the number and value of lost textbooks from the lost textbook cards.</p>
School Textbook Coordinator	<p>16.Attempts to collect money from the student's parents.</p> <p>17.Works with warehouse I - textbook leadman to pay for any lost textbooks.</p>

Note: Text in italics indicates a manually intensive process.

Source: Warehouse Department, SISD

Recommendation 68:

Place a bar code on all district textbooks for middle and high schools and install an automated data entry system for textbook tracking in middle and high schools.

The implementation of a bar-coding system for district textbooks in middle and high schools should eliminate the need for temporary employees to manually stamp the six-digit codes on textbooks and allow middle and high schools to automate their data entry process for textbooks. The automated textbook system should help control and minimize textbook losses.

The assistant principal in charge of textbooks at Montwood High School should determine and resolve the specific reasons for high textbook losses in 1996-97. The district should implement solutions to high textbook losses at Montwood High School before any expansion of the automatic data entry system in the district.

Upon satisfactory resolution of the situation at Montwood High, SISD should develop an automated data entry system based on bar-code technology for distributing and collecting textbooks at middle and high schools. Each student's identification card should contain the student's name, student identification number, class schedule, and semester embedded into a bar-code on the card. During the distribution and collection of textbooks, the textbook clerk should scan the student's identification card for student information and each textbook for textbook information.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The director of Purchasing, with the assistance of warehouse and textbook personnel, recommends a supplier for the bar-coding system to the assistant superintendent of Finance.	May 1998
2	The assistant superintendent of Finance approves, with any necessary changes, the purchase of a bar-coding system.	June 1998
3	The director of Purchasing, with the assistance of the purchasing agent and the technical systems coordinator and the assistant principals in charge of textbooks, recommends an automated data entry system for textbooks to the assistant superintendent of Finance.	August 1998
4	The assistant superintendent of Finance approves, with any necessary changes, the purchase of a bar-coding system and an automated data entry system for textbooks.	September 1998

5	The bar-coding systems for the warehouse and automated data entry system for textbooks at district middle and high schools are installed.	November 1998
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FISCAL IMPACT

To install a bar-code system, the Warehouse Department would need a thermal transfer laser printer costing \$1,500, single-user bar-code software at \$1,500, and a portable bar-code scanner at \$1,600. The total system should cost an estimated \$4,600. Bar code labels for textbooks cost about one cent per label. With about 155,000 textbooks in the district, the cost of bar code labels is estimated at \$1,550. Assuming the district bar codes 27,870 newly adopted textbooks annually, the bar code labels should cost about \$279 annually (27,870 newly adopted textbooks at one cent a label).

The site license for automated data entry software for textbooks should cost about \$700 a school or \$4,200 for the six middle and high schools in the district that don't already have automated textbook tracking systems. The portable bar code scanners should cost about \$1,600 each or \$12,800 for eight scanners. After bar-coding the textbook inventory, the district should eliminate the four, two-month temporary positions, saving \$13,440 annually (21 days or 1,344 hours at \$10 per hour).

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Purchase a bar-coding system	(\$4,600)	\$0	\$0	\$0	\$0
Purchase bar-code labels	(\$1,829)	(\$279)	(\$279)	(\$279)	(\$279)
Purchase data entry software and bar-code scanners	(\$17,000)	\$0	\$0	\$0	\$0
Eliminate four temporary positions	\$0	\$13,440	\$13,440	\$13,440	\$13,440
Total Savings (Costs)	(\$23,429)	\$13,161	\$13,161	\$13,161	\$13,161

Chapter 8

PRINT SHOP DEPARTMENT

CURRENT SITUATION

SISD's Print Shop Department provides printing and copying services to district personnel with a staff of one supervisor, three printers, and one clerk. The number of impressions (that is, sheets of copied or printed paper) produced by the Print Shop each year has fluctuated from 3.3 million in 1993-94 to 7.7 million in 1996-97 (**Exhibit 8-29**).

Exhibit 8-29

Operating Statistics

Print Shop

1994-97

	1993-94	1994-95	1995-96	1996-97
Number of Copy Impressions	-0-	-0-	-0-	1,552,170
Number of Print Impressions	3,372,123	6,580,243	4,572,376	6,236,962
Total Number of Impressions	3,372,123	6,580,243	4,572,376	7,789,132
Number of Jobs	560	650	747	1322

Source: Print Shop, SISD

The Print Shop traditionally focused on printing services, but added copying services in 1996-97. The Print Shop operates the following equipment in its daily operations (**Exhibit 8-30**).

Exhibit 8-30

Age of Equipment

Print Shop

Type of Equipment	Model Year	Age in Years
1- Chandler Letterpress	1947	50
1- Baum Foler	1960	37

1- Rosback Auto Stitcher	1960	37
1- Challenge Paper Drill	1965	32
1- Itek 1218 Platemaster	1980	17
1- Royal Zenith Paper Cutter	1980	17
1- A.B. Dick 8810 Press	1985	12
2- A.B. Dick 9810 Presses	1986	11
1- Interlake Stitcher	1987	10
1- Sulby Binder	1988	9
1- Bourg Collator	1988	9
1- Nuarc Plate Burner	1988	9
1- Nuarc Camera	1988	9
1- Kodak 235 Copier	1989	8
1- Sergeant Wrapper	1996	1

Source: Print Shop, SISD

FINDING

Although structured as an internal service fund, the Print Shop has operated at a loss in recent years (**Exhibit 8-31**).

Exhibit 8-31

Statement of Revenues and Expenses Print Shop

1993-94 through 1995-96

	1993-94	1994-95	1995-96
Revenues	\$91,660	\$126,038	\$174,098
Payroll Costs	\$147,378	\$153,916	\$149,650
Purchased and Contracted Services	\$9,981	\$672	(\$2,532)
Supplies and Materials	\$12,252	\$43,851	\$74,755
Depreciation	\$11,523	\$11,523	\$11,523

Expenses	\$181,134	\$209,962	\$233,396
Net Income (Loss)	(\$89,474)	(\$83,924)	(\$59,298)

Source: SISD Annual Financial Reports and Department of Support Services, SISD

According to district personnel, much of this operating loss is a result of manually intensive processes and a lack of automation. For example, the folding and stapling process is completely manual; two positions dedicate about 20 percent of their time to these tasks and often require assistance from other staff members for rush jobs. The estimated cost of automated folding/stapling equipment is \$9,000.

The district spends 5 cents per impression for in-house printing services and loses .01 to .02 cent per impression over a three year period (**Exhibit 8-32**).

Exhibit 8-32

Revenue and Expenditures per Impression Print Shop

1993-94 through 1995-96

Category	1993-94	1994-95	1995-96
Revenue	\$91,660	\$126,038	\$174,098
Expenses	\$181,134	209,962	\$233,396
Net Income (Loss)	(\$89,474)	(\$83,924)	(\$59,298)
Number of impressions	3,372,123	6,580,243	4,572,376
Revenue per impression	\$0.03	\$0.02	\$0.04
Expenses per impression	\$0.05	\$0.03	\$0.05
Net Income (Loss) per impression	(\$0.02)	(\$0.02)	(\$0.01)

Source: SISD Annual Financial Reports and Department of Support Services, SISD

Major customers of the Print Shop, such as the Communications Department, have experienced serious customer service problems. Because of the charges and the time it takes the Print Shop to deliver printing jobs, the Communication Department has found it to be more advantageous to get some of its printing done elsewhere.

The Wichita Falls Independent School District established an internal service fund in 1992. At that time, its printing operations had been a small operation within the general fund. When the fund was established, equipment was purchased with general fund dollars, but set up as a loan. Existing assets and the paper inventory were also transferred so that all equipment was accounted for in the fund. The internal service fund then owed the general fund. The original plan was for a three-year payback, but the print shop generated enough revenue to pay off the loan in one year.

Recommendation 69:

Upgrade Print Shop machinery and equipment and reduce staff by automating operations.

An internal service fund can borrow funds from the general fund to cover the cost of capital equipment and repay the general fund on a monthly or annual basis from profits. The director of Support Services should set up such a loan from the general revenue fund balance to finance upgrades in machinery and equipment at the Print Shop through the Department of Finance. By automating operations, the district should be able to reduce staff in the Print Shop, and improve productivity and profitability. Further, in the future the district should set up a method of continually upgrading equipment using a system of depreciation. Loan repayments must be made from profits. If after three years the Print Shop cannot become profitable, it should be closed and the printing work contracted out to printing service vendors.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The director of Support Services identifies the Print	April 1998
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	Shop's machinery and equipment needs.	
2	The director of Support Services requests authorization from the board to set up a loan from the general fund with a repayment plan.	May 1998
3	The assistant superintendent of Finance sets up the loan and repayment plan.	June 1998
4	The director of Support Services purchases the necessary machinery and equipment for the Print Shop.	June - August 1998
5	The director of Support Services establishes a two- to three-year evaluation cycle for the Print Shop and evaluates its performance according this cycle.	May 1998 and Ongoing

FISCAL IMPACT

Estimating that new machinery and equipment needs will not exceed \$30,000 and the pay back period will not be longer than the three year evaluation cycle, the annual loan repayment amount should average \$10,000 plus 5 percent interest on \$30,000, or \$11,500 per year.

Part of the new equipment needed would include the purchase of automated folding/stapling equipment (approximately \$9,000). This will immediately cause an improvement in the Print Shop's operation and should allow the district to reduce staff by one Printer I position through attrition, saving \$15,016 in salaries and benefits annually.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Upgrade print shop machinery	(\$11,500)	(\$11,500)	(\$11,500)	\$0	\$0
Reduce staff	\$15,016	\$15,016	\$15,016	\$15,016	\$15,016
Total	\$3,516	\$3,516	\$3,516	\$15,016	\$15,016

Chapter 9

COMPUTER TECHNOLOGY

This chapter examines SISD's management and use of computer technology in five sections.

- A. Organization, Structure, and Management
- B. Operations
- C. Planning
- D. Business Technology

- E. Instructional Technology

SISD is relatively advanced in the area of computer technology. On the instructional side, there are computers in every classroom, computer labs in every school, and every classroom and lab in the district is connected to the district's network and the Internet. Until recently, the district has focused on establishing its hardware and software base. Now the district is shifting its focus to training and support to ensure that it maximizes the instructional benefits of its technology.

SISD also purchased a software package several years ago to automate its business functions. The district is in the process of replacing this system, and must ensure that the new system fully supports streamlined business processes.

SISD runs several commendable computer-related programs, including a computer purchase program for teachers and a course in instructional technology offered at the University of Texas at El Paso. TSPR found, however, that the district could improve its technology functions by adding additional instructional technology staff, improving its methods of tracking and monitoring performance, and strengthening its planning processes.

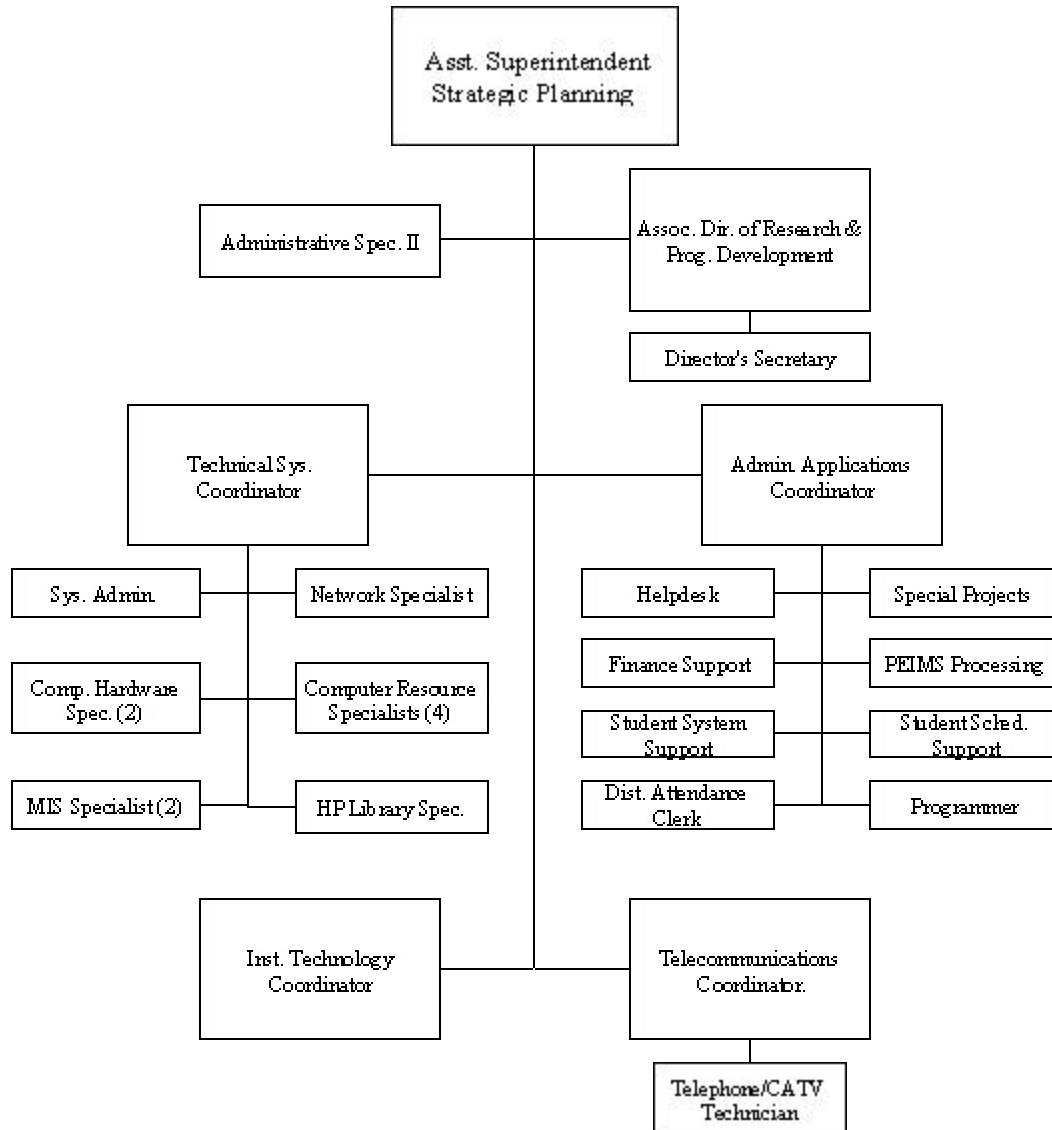
A. Organization, Structure, and Management

CURRENT SITUATION

SISD's technology functions are centralized in its Department of Strategic Planning. The department is organized into five teams-Technical Systems, Administrative Applications, Instructional Technology, Telecommunications, and Research and Program Development (**Exhibit 9-1**). Each of these teams is managed by a coordinator; the Research and Program Development team was created only recently, and at this writing its coordinator position has not been filled.

Exhibit 9-1

Strategic Planning Organization Chart



Source: SISD

When SISD's technology director left the district in summer 1997, the district chose not to fill the position. Since the installation of its hardware and network was completed by the end of 1997, and since the district is changing its focus to staff development and support, the Strategic Planning Department felt that a technology director position was no longer necessary. Instead, the four technology coordinators now report directly to the assistant superintendent of Strategic Planning. The department then chose to use the funding for the director position to create a new position for Research and Program Development. This position will be responsible for coordinating distance learning, teleconferencing, and program evaluation.

The department has 28 full-time equivalent employees. **Exhibit 9-2** shows the staffing, responsibilities, and budget for each team within Strategic Planning. The department's 1997-98 budget is about \$2 million.

Exhibit 9-2

Technology Departments

Department	Staffing	Responsibilities	1997-98 Budget
Office of Assistant Superintendent	2	Oversees technology for district.	\$207,991
Technical Systems	12	Supports all hardware and data communication services.	\$669,387
Administrative Applications	9	Supports software associated with non-instructional applications through phone support and training. Also manages PEIMS data.	\$552,677
Instructional Technology	1	Supports all software for direct instructional use in the classroom.	\$67,560
Telecommunications	2	Supports district's telecommunication needs.	\$354,235
Research and Program Development	2	Writes grants, coordinates distance learning facilities, conducts program evaluations.	\$231,348
Total	28		\$2,083,198

Source: SISD Strategic Planning Budget

SISD's technology functions are funded through several sources (**Exhibit 9-3**).

Exhibit 9-3

Technology Funding Sources and Uses

Source	Use
State Technology	State funds allocated to the district and to schools based

Allotment/State Textbook Allotment	on a per-student amount. These funds go directly to schools to fund technology. This amount is currently \$30 per student.
Bond Funds	Funds from a district bond issue used primarily to purchase hardware, wire buildings, and connect hardware throughout the district.
General District Funds for Data Processing	District funds spent primarily through the Administrative Applications and Technical Systems teams. These funds cover most of the cost of operating these two teams as well as the cost of providing various services including Pentamation support and training, hardware maintenance, and other support services.
General District Funds for Other Functions	District funds that cover the cost of operating the rest of the Strategic Planning Department and services provided by the department.

Source: Neal & Gibson

Between the 1992-93 and 1996-97 school years, the district's technology expenditures increased by 333 percent, from under \$800,000 to over \$3.4 million (**Exhibit 9-4**). This increase was made possible by bond funds that accounted for approximately 40 percent of SISD's technology spending during 1994-95, 1995-96, and 1996-97.

Exhibit 9-4

District Technology Expenditures by Source of Funds

1992-93 through 1996-97

Source	1992-93	1993-94	1994-95	1995-96	1996-97
State Technology Allotment / State Textbook	\$286,366	\$598,295	\$604,700	\$406,674	\$417,311
Bond Money		-	\$1,390,582	\$1,154,696	\$1,336,064

District Funds - Data Processing Function	\$513,051	\$750,210	\$860,863	\$868,587	\$955,744
District Funds - Other Functions	NA	NA	NA	\$792,508	\$755,205
Total Technology Expenditures	\$799,417	\$1,348,505	\$2,856,145	\$3,222,465	\$3,464,324
Per Student Total	\$47.71	\$76.58	\$151.75	\$160.00	\$164.20

Source: SISD financial report

Note: These expenditures do not include expenditures made by departments or schools using other funds from their respective budgets.

Between 1992-93 and 1996-97, the district's per-student technology expenditures rose by 244 percent, from \$47.71 per student to \$164.20. According to a 1996 Rand Corporation study of technology-rich schools, annual costs related to technology use in those schools was estimated to be about \$180 to \$450 for each student. Despite the district's sizable investment in technology, its per student expenditure is still below technology-rich schools.

FINDING

In the early 1990s, SISD made a significant investment in instructional technology that was guided by its 1992-97 Technology Plan. This plan called for placing computers in every classroom and a computer lab in every school and connecting all district computers to a district network and the Internet. Implementation of this plan was completed at the end of 1997 when all remaining schools were connected to the network. The district now is finalizing an instructional technology plan for 1997-2002. This plan, as noted above, will shift the district's focus to staff development efforts designed to ensure that district employees have the training and support they need to maximize the instructional benefits of new technologies.

The district also invested in business technology in 1993 when it purchased Pentamation to automate its administrative functions. The business modules of this software were implemented during the 1994-95 fiscal year, and the student modules were installed for the start of the 1995-96 school year. The district's version of Pentamation, however, is not year-2000 compliant-in other words, it will not function properly after the dating change occurring at the turn of the century- and the district is in the process of procuring a replacement system.

In all, the district has a sound infrastructure to support its business and instructional technology. Various district sites are connected by both local area networks and a wide area network. The computer servers that support the district's business applications, e-mail, and library systems are located at the Education Center. Computers in the district are divided evenly between Macintosh and IBM personal computers.

SISD students and staff seem very comfortable with computers. District students, faculty members, and staff have more than 12,000 e-mail accounts and use the Internet more than 72,000 times each day. The district offers about one computer for every 10 students, a ratio that is better than both the national average of 12 to 1 and the Texas average of 10.2 to one.

The district's views on computers also can be seen in the results of a TSPR survey; 72.1 percent of students surveyed agreed or strongly agreed that computers are available at their schools whenever they need them, and 78.5 percent said they feel comfortable using computers (**Exhibit 9-5**).

Exhibit 9-5

Results of Student Survey

Question	No Response	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	No Opinion
Computers are available at my school whenever I need them.	0.0 %	27.8 %	44.3 %	12.2 %	8.9 %	1.7%	5.1%
I feel comfortable using computers.	0.4%	31.2 %	47.3 %	13.9 %	5.9 %	0.0 %	1.3%

Source: TSPR survey

A large majority of parents also responded that their children were using computers and the Internet at school and that their children were comfortable in using computers and the Internet (**Exhibit 9-6**).

Exhibit 9-6

Results of Parent Survey

Question	No Response	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	No Opinion
My child(ren) is using computers and the Internet at school.	2.7 %	16.2 %	62.2 %	8.1 %	8.1 %	2.7 %	0.0 %
My child(ren) feels comfortable using computers and the Internet.	2.7 %	18.9 %	62.2 %	5.4 %	2.7 %	2.7 %	5.4 %

Source: TSPR Survey

Teachers and school administrators also seem confident about the district's use of technology; more than four-fifths feel that technology is available to complete administrative tasks, and that the district uses technology effectively to support instruction (**Exhibit 9-7**).

Exhibit 9-7

Results of Teacher and School Administrator Survey

Question	No Response	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	No Opinion
Technology is readily available for me to	2.5 %	31.5 %	53.7 %	3.1 %	6.8 %	1.9 %	0.6 %

complete my administrative tasks.							
The district effectively uses technology to support instruction and student learning.	1.9 %	32.7 %	51.2 %	8.0 %	4.3 %	1.2 %	0.6 %

Source: TSPR survey

Finally, all district administrators responded that technology is readily available for them to accomplish their administrative duties (**Exhibit 9-8**). More than 85 percent agreed that the district uses technology effectively both to support instruction and student learning and to streamline administrative functions.

Exhibit 9-8

Results of District Administrator Survey

Question	No Response	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	No Opinion
Technology is readily available for me to accomplish my administrative duties.		50.0 %	50.0 %	0.0 %	0.0 %	0.0 %	0.0 %
The district effectively uses technology to	0.0 %	35.3 %	50.0 %	8.8 %	0.0 %	0.0 %	5.9 %

support instruction and student learning.							
The district effectively uses technology to streamline administrative functions.	0.0 %	20.6 %	64.7 %	8.8 %	2.9 %	0.0 %	2.9 %

Source: TSPR survey

COMMENDATION

The district has done an effective job in implementing computer technology.

FINDING

SISD spends about \$2 million a year on computer technology, but does not use status reports to follow the progress of computer projects or performance reports to manage its resources.

No status reports were used to monitor the implementation of the 1992-97 Technology Plan; none are planned for use in the implementation of the 1997-2002 Technology Plan. Yet without these reports, it is difficult to ensure that projects stay on schedule and within budget.

Similarly, while the Strategic Planning coordinators meet with the assistant superintendent of Strategic Planning weekly, they do not provide status or performance reports that would allow senior management to assess staff workloads, study trends or problems in hardware or software, or identify opportunities for improved performance.

Finally, SISD's board reviews the status of technology expenditures only once a year, at the budget meeting, and cannot assess expenditures or performance during the course of a school year.

Recommendation 70:

Develop a set of standard technology-related performance reports.

Status reports should be developed to monitor technology plan expenditures, progress, and results. A sample format is suggested in **Exhibit 9-9**.

Exhibit 9-9

Sample Status Report for Technology Plan

Task	Due Date	Original Budget	Accomplishments to Date	Percent Complete	Budget Remaining	Issues

Source: Neal & Gibson

Performance reports also should be developed to allow Strategic Planning to assess workloads and response times and to identify needs, trends, and problems. The teams that directly support the district's hardware and software, Administrative Applications and Technical Systems, should be assessed on their responsiveness to work requests and calls. **Exhibit 9-10** presents a sample report showing how this performance can be evaluated.

Exhibit 9-10

Sample Performance Report

Department / Position	Number requests/calls received this	Number closed this week	Number open/pending	Average time to close	Of those that are still open.

	week				average time open
Administrative Applications					
Position 1					
Position 2					
Position 3					
Technical Systems					
Position 1					
Position 2					
Position 3					

Source: Neal & Gibson

The performance report also should include a section designed to monitor trends in problems with hardware. **Exhibit 9-11** presents an example of how this might be done.

Exhibit 9-11

Sample Performance Report

Downtime	Time	Which Equipment/ Department	Reason
Servers			
Computers			
Lines			

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Source: Neal & Gibson

These reports should be delivered to the assistant superintendent of Strategic Planning on a monthly basis and to the superintendent and board on a quarterly basis.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent of Strategic Planning and the department's coordinators identify performance measures for each technical team (Administrative Applications, Technical Systems, Instructional Technology and Telecommunications).	June 1998
2	The assistant superintendent of Strategic Planning and the department's coordinators develop performance reports for each technical area.	July 1998 - August 1998
3	The Strategic Planning coordinators begin collecting performance measures for performance reports.	August 1998
4	The Strategic Planning coordinators produce the first performance report for the assistant superintendent of Strategic Planning, the superintendent, and the board.	September 1998

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

Strategic Planning has lost nine out of a total of 25 employees-38 percent of its staff-in the last 11 months, resulting in slower technical support and additional expenditures to fill these positions. One of the nine took a promotion within the district and another went back to school, but the other seven took technical positions for higher salaries with other employers. Six of these seven were members of the Technical Systems team. As **Exhibit 9-12** shows, the pay increases they earned by leaving SISD ranged from about \$6,000 to \$20,000 annually, with the average being close to \$14,000.

Exhibit 9-12

Individuals Leaving Strategic Planning

Since December 1996

Position	New Position	New Employer	Approximate Annual Increase in Salary
Technology coordinator	Similar position: MIS technical manager	Private Sector	\$20,000
Hardware technician	Similar position: hardware analyst	Private Sector in Dallas	\$20,000
Technology director	Promotion: executive director	El Paso ISD	\$15,000
System administrator	Promotion: MIS tech manager	Private Sector	\$20,000
Network specialist	Promotion: network coordinator	El Paso ISD	\$10,000
Hardware technician	Similar position: hardware technician	Ysleta ISD	\$ 8,000
Hardware technician	Similar position: hardware technician	Private	\$ 6,000
Director's secretary	Promotion: benefits specialist	SISD	\$ 2,000
PEIMS specialist	Returned to school		

Source: SISD Strategic Planning Department

The Strategic Planning Department has collaborated with the Texas Association of School Boards to conduct a salary survey for its technical positions. The survey showed that the district's salaries for technical positions are quite low. Armed with the survey results, the Strategic Planning and Human Resources Departments worked together to develop a set of recommendations for the board that included a separate, higher salary schedule for technical positions. For example, salary ranges for three of the Strategic Planning coordinators previously ranged from \$33,265 to \$49,899. Under the recommended pay scale, the salaries for these positions would range from \$51,162 to \$72,120. These salaries are much closer to market rates and should help the district retain qualified employees. The recommendations were presented to the board in November 1997 and were approved.

Recommendation 71:

Review technical salaries on an annual basis to ensure the district remains competitive.

In view of the high demand for technical employees, the district should review its salaries annually to ensure that it does not lose qualified people. The Human Resources staff should review these salaries annually. If the district's salaries appear to be falling behind market levels, the district should conduct another thorough salary survey.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The Human Resources staff assesses salaries of technical positions.	Annually
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FISCAL IMPACT

This recommendation can be accomplished within existing resources.

Chapter 9

OPERATIONS

CURRENT SITUATION

While the district's centralized technology functions are administered by the department of Strategic Planning, individual schools also play an active role in technology management.

Site-based decision-making (SBDM) dictates that each school should maintain significant responsibility for its own computer resources. For instance, schools receive \$30 per student each year to spend on computer technology. The schools are required to spend these funds on technology, but may also supplement this funding with other funding sources. Technology committees at each school, made up of teachers, administrators, parents, students, and community members, are responsible for making technology decisions for their school. These committees are responsible for planning and managing their schools' hardware and software selections and purchases; planning for future acquisitions; and identifying ways in which computers can be used most effectively. These committees are separate from the School Improvement Teams (SITs), but make their recommendations to the SITs.

While the schools make many of their own decisions in this area, the district provides technical support for their activities and manages the rest of the district's technology infrastructure. Strategic Planning also supports schools by maintaining equipment and networks, suggesting effective uses of instructional technology, and answering questions about standard district software such as Pentamation.

Individual schools and the district share responsibilities in the area of purchasing. While the district paid for most of the equipment introduced as part of the 1992-97 Technology Plan, future equipment purchases will be left to the schools and will come out of the schools' budgets. The district recommends certain specifications for equipment, but the schools will decide what they want to purchase. All technology purchase requests are routed through the Strategic Planning Department for review by either the assistant superintendent or the Technical Systems coordinator. If the equipment appears to be below district standards or, conversely, to be more sophisticated than needed, the assistant superintendent or coordinator reviewing the recommendation will contact the school to explain these concerns. If necessary, Strategic Planning may inform the school that the department will not support the hardware purchase. This is primarily true in the case of used or rebuilt machines, because they are often the hardest to maintain. While the schools make the final decision

about purchases, they generally listen to the department's concerns and make a decision that Strategic Planning supports.

Other than several standard district software packages-e-mail, GradeBook, Netscape and Pentamation-schools also have the final decision about what software to purchase. Again, as with the hardware, schools are encouraged to purchase software that is supported by the district. For instance, the district provides training in ClarisWorks for Macintosh users and Microsoft Works for PC users.

Exhibit 9-13 summarizes the respective responsibilities of schools and the district.

Exhibit 9-13

Computer Technology: Division of Responsibilities

Level	General Responsibilities
Schools	<ul style="list-style-type: none"> • Decide how to spend their technology budget • Decide where to locate computers (labs or classrooms) • Decide when to replace/upgrade computers • Decide what hardware to purchase (computers, printers, etc.) • Decide what software to purchase (instructional packages) • Decide what training their staff should receive • Decide how computers should be used • Back up school's data and files • Run virus protection on school's equipment
District	<ul style="list-style-type: none"> • Provide and support network, wiring and servers • Set standards/recommendations for hardware and software • Provide technical support for hardware, fix equipment • Provide technical support for standard district software (word processing, e-mail, spreadsheets, business software), answer questions • Provides information and ideas about instructional technology • Train staff in virus protection, backing-up data, and standard district software • Maintain network • Maintain district's computers • Back up district's data

Source: Neal & Gibson

FINDING

TSPR found that SISD does a very good job in communicating computer-related information and ideas to its schools and teachers with minimal resources. **Exhibit 9-14** summarizes several ways in which the district maintains a flow of information related to computer technology.

Exhibit 9-14

Methods of Communicating Computer Information

Communication Method	Description
SISD Assist list-serv	The SISD Assist list-serv is a mailing list of participants throughout the district interested in technology. The group meets on-line daily (through group e-mails) and in person once a month to troubleshoot, offer solutions, ask questions, and share successes and ideas. About 50 individuals participate in the list. About 20 to 25 of them attend the monthly, in-person meetings.
Project list-serv	The Project list-serv provides ideas for projects from teachers around the world. Frequently, a teacher will use the mailing list to find another teacher or class willing to work with his or her class on a specific project. Through this process, students in SISD can work and communicate with students throughout the country and the world. For example, a class in Australia may want a class in America to work with them to study weather. About 100 SISD employees participate in the Project list-serv.
Technology Committee	This committee is made up of one technical employee, one non-technical employee, and one administrator from each school. The group meets with the district's Instructional Technology coordinator bimonthly to discuss instructional technology issues facing the district. This group developed the current draft of the 1997-2002 Technology Plan.
Technology Newsletter	Includes district computer technology updates, descriptions of technology programs and projects from various schools, interviews with technology staff members written by students, a list of training classes offered by Strategic Planning, and a list of useful educational websites.

Technology Conference -- March 28,1998	A conference of teachers as well as outside presenters and possibly technology vendors. Most schools in the district use the technology conference as a staff development day.
Catalog of training classes	Twice a year, the district's Instructional Technology coordinator compiles a catalog of technology training courses taught by district staff at no additional cost to the schools. The catalog includes 160 classes on 23 topics. If these courses are not filled by teachers, they are offered at no cost to other district employees as well as to community members. Examples of classes included in the catalog are ClarisWorks, Microsoft Works, Windows 95, HyperStudio, Internet Use, GradeBook, Netscape, etc.
Strategic Planning meetings held at schools	The assistant superintendent for Strategic Planning meets weekly with the four technology coordinators. The group holds its meeting at a district school every two or three weeks. The principal of the school at which the meeting is held is invited to participate.
Web Page	The district's web page offers the technology training schedule, manuals, Help Desk work order forms, and bulletins such as the attendance bulletin.

Source: Strategic Planning publications and interviews

COMMENDATION

SISD does an effective job of communicating with its schools about computer-related topics.

FINDING

The district recently purchased system management software that includes an automated software distribution module.

This software will allow the district to conduct automated hardware and software inventories, detect pirated software, and track machine failures. The automated software distribution module also will allow the district to install software and upgrades to all computers on the network from a central location through a single process. With this module, an individual will no longer need to go to each computer in the district to install software, or install software on one computer at a time. This module also will help to ensure that software is installed properly.

COMMENDATION

The district has purchased system management software that will streamline departmental operations.

FINDING

While SISD does a good job of communicating with its schools about computer technology, it is not as successful in providing training. While most computer training is left to the schools, the district's Instructional Technology team offers classes throughout the year on a variety of computer-related topics and software packages. Attendance at these classes, however, often is low.

Twice a year, the district's Instructional Technology coordinator produces a catalog of technology training classes. Last year, the catalog included 160 classes on 23 different topics including ClarisWorks, Microsoft Works, Windows 95, HyperStudio, Internet Use, GradeBook, and Netscape. All of these classes are taught by district staff. Again, while teachers are given first priority, these classes are open to anyone in the community at no charge.

While these classes appear to be an effective and inexpensive way to communicate technical information, they are not well-attended. Two years ago, these classes had an average of 15 participants. Last year, participation dropped to six or seven for each class, and enrollment is even lower this year. While it used to take four people to "make a class," classes now can be held with as few as two participants.

Providing these 160 classes costs the district \$6,500 a year. This means that the average cost of each class is \$40.63, which is quite inexpensive compared to the cost of outside training.

Recommendation 72:

Modify course offerings, market new course offerings, and adjust the training budget based on enrollment.

Since SISD's training courses are both effective and cost-efficient, the district should attempt to learn why enrollment has been declining and what classes staff members are most interested in. This could be done through a simple survey. The Instructional Technology coordinator then could use this information to modify course offerings and to market a revised schedule of classes.

The district should continue to offer these classes, but should take steps to link the supply of classes to demand. The Instructional Technology coordinator should set a minimum enrollment for classes.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The Instructional Technology coordinator surveys staff to determine why enrollment has been declining and what could be changed to increase enrollment.	April 1998
2	The Instructional Technology coordinator modifies the course schedule for the 1998-99 school year.	July 1998
3	The Instructional Technology coordinator sets minimum enrollment levels for each class.	August 1998
4	The Instructional Technology coordinator markets the revised schedule to district staff.	August 1998
5	The Instructional Technology coordinator begins canceling classes below minimum enrollment.	August 1998
6	The Instructional Technology coordinator and the assistant superintendent of Strategic Planning assess new enrollment trends and determine an appropriate level of future funding for this type of training.	July 1999

FISCAL IMPACT

This recommendation could be implemented with current resources. Moreover, the district could save money by eliminating unpopular classes and re-channel those resources into more productive course offerings.

FINDING

The district has a help desk, staffed by a single individual who is part of the Administrative Applications team. The help-desk person receives calls and work requests for technical assistance and support from anyone in the district. When requests are received they are logged into the help desk software, printed out, and distributed to the appropriate technical support person. Once this person has responded to the request, the help-desk worker is informed and records the request as closed. Since those who respond to the requests do not have access to the help-desk software, assignments must be made manually, and the request record cannot be updated until the help desk has been notified. This is time-consuming and it makes it impossible to know the status of a request in progress. **Exhibit 9-15** presents the steps involved in a typical work request.

Exhibit 9-15

Steps in the Work Request Process

Actor	Action
Help Desk position	Receives request/question
Help Desk position	Logs request into hand log
Help Desk position	Records request into help desk software
Help Desk position	Prints out report of request
Help Desk position	E-mails requestor and technician that request has been entered
Technician or other MIS position	Picks up requests from Student Activities Complex
Technician or other MIS position	Holds on to hard copy of the request until she or he has time to respond
Technician or other MIS position	Responds to request
Technician or other MIS position	Fixes problem/answers question
Technician or other MIS position	Writes resolution on hard copy of request
Technician or other MIS position	Returns hard copy of request to Help Desk
Help Desk position	Records that request is closed and resolved
Help Desk position	E-mails requestor that request is closed

Source: Neal & Gibson

While the help desk is set up to receive all requests for technical assistance and support, many requests are not routed through the help desk. The help desk receives most of the district's requests for hardware support, but many users of the district's business applications call support personnel directly. Similarly, most users of instructional technology call the

coordinator of Instructional Technology directly. Since these other individuals do not have access to the help desk software, they cannot enter requests they receive into the help desk application. Moreover, they rarely log the calls and requests they receive. According to SISD records, between the months of January 1997 and August 1997, the help desk received an average of 13 calls per day. The department handled many more requests than that, but management has no way of knowing how many.

Addressing procedural and policy issues that relate to the help desk, such as requiring all requests for technical assistance to be routed through the help desk only, would provide some remedy. However, SISD's "help-desk" software is also inadequate. The software does not allow the help desk staff person to prioritize requests effectively or to collect necessary information, such as reasons for delays of pending work orders, that are essential to aiding in problem-solving. In addition, the software is complicated to use and cannot be accessed from the schools, where technicians spend most of their time.

Management relies on the help desk worker to print out status reports using the software. These reports, which generally are produced weekly, help managers to understand the type, quantity, quality, and timeliness of work being done in their departments and to better understand the district's technical problems. Unfortunately, these reports are incomplete, as they do not report all calls for assistance. Furthermore, the data entered may not be accurate, complete, or timely, since the individual performing the work cannot update the request as work progresses.

In all, SISD's help-desk software makes it impossible to assess workloads, recurring problems, quality of service, and response times. Finally, the time technicians and other related staff spend in picking up, filling out, and dropping off work requests could be better spent fixing problems. As mentioned at the beginning of this chapter, the district is considering replacing Pentamation, the district's computer system. When this occurs, the help-desk software issue could be addressed in the request for proposal (RFP) to replace Pentamation.

Recommendation 73:

Purchase more effective help desk/work request software and develop procedures to streamline help-desk activities.

The coordinators for Administrative Applications and Technical Systems should identify requirements for help-desk software. These requirements may include the ability to enter and track all necessary data (including sufficient priority categories and status information); access the

application from all administrative offices and school sites; allow all district staff to enter and track their work requests through their own computers rather than calling the help desk; and provide data categories in the software that can be used to aid in resolving problems. The software should also be user-friendly to encourage its use. The district also should consider help-desk products that offer Internet and e-mail interfaces that would allow anybody with Internet or e-mail access to enter or track their work requests.

The district should include these requirements as part of its request for proposals (RFP) to replace Pentamation. This would allow the district to specify its exact functional requirements, including access by all district staff, if desired. Also, if the help desk application is part of the larger business application, the two applications should easily share data. Furthermore, it is possible that suppliers bidding on the RFP may be able to provide help-desk software at a lower cost than off-the-shelf help-desk packages. If the bidder's cost for the help-desk module is too high, the district may choose to purchase an off-the-shelf package.

Once the software is purchased, Strategic Planning should develop procedures to ensure that all calls and requests are logged and that their status is updated in the software in a timely fashion. The technology coordinators should monitor performance daily and weekly and the assistant superintendent for Strategic Planning should review reports monthly.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The Administrative Applications coordinator and the Technical Systems coordinator solicit input from their staff and district staff to define requirements and priorities for new help desk/work request software.	May 1998
2	Based on the identified requirements, the Administrative Applications coordinator and the Technical Systems coordinator conduct a software search to identify potential software packages.	July 1998
3	The Administrative Applications Coordinator and the Technical Systems Coordinator evaluate potential packages.	July 1998 - August 1998
4	The Administrative Applications coordinator and the Technical Systems coordinator select a package.	August 1998
5	The Administrative Applications coordinator and the Technical Systems coordinator recommend the package to the assistant superintendent of Strategic Planning.	September 1998

6	The assistant superintendent of Strategic Planning approves the purchase.	September 1998
7	The Administrative Applications coordinator and the Technical Systems coordinator develop procedures for the use of the new software.	October 1998
8	The Administrative Applications coordinator and the Technical Systems coordinator install the new software and train staff in the use of the new software.	October 1998

FISCAL IMPACT

The primary expense of this recommendation would be the purchase cost of a replacement software package. The district should be able to purchase a software product for approximately \$19,200. This estimate is based on a common help-desk software package that costs \$2,400 per concurrent user for 10 concurrent users and includes all technical support, upgrades, and maintenance for two years.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Purchase Help Desk Software	(\$19,200)	\$0	\$0	\$0	\$0

FINDING

It appears that Strategic Planning may be slow to respond to and fix technical problems. District employees expressed dissatisfaction with response times during focus groups and interviews. Several individuals said that it often takes weeks for Technical Systems to fix computer problems. These opinions are supported by data collected through the district's help-desk software. According to reports produced by this software, Technical Systems requires an average of 14 days to close a work request. Although these software reports may be unreliable, they are the only means the district has for tracking response time. **Exhibit 9-16** shows response time by priority of call. According to the data shown, Technical Systems apparently takes longer to close "very high priority" calls than it does to close "high priority" calls.

Exhibit 9-16

Response Time by Priority of Call

Priority	Average Number of Days to Close
Very High	10.84
High	8.89
Medium	15.25
Average Overall	14.28

Source: Help Desk reports from SISD's Strategic Planning department

During these periods, while staff waits for Technical Systems to fix a problem, staff and students may be unable to use their hardware or software, affecting both student learning and administrative operations.

Several factors may contribute to the apparently lengthy response times. First, as already noted, the help-desk data is not accurate. According to the district, technicians are called immediately when a very high priority call is received, but their responses are not logged into the help-desk software until the help desk is informed, which may be several days later. Second, many of the longer delays occur when the department waits for parts; unfortunately, the reason for the delay cannot be logged into the help-desk software. Finally, high turnover in Technical Systems has hurt the team's efficiency and the team has been largely occupied with completing the connection of the district's schools to the network.

Recommendation 74:

Set performance targets for beginning and completing work requests and monitor response time against these targets.

Strategic Planning would benefit from performance targets to ensure quick response. **Exhibit 9-17** suggests possible response targets for beginning and completing work.

Exhibit 9-17

Suggested Performance Targets

Priority	Example	Suggested Target for	Suggested Target for
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		Beginning Work	Completing Work
Absolutely Urgent	Those that keep a department from critical operations such as check issuance.	1 hour	3 hours
High Priority	A computer lab that cannot operate at least 90 percent of its machines.	2 hours	4 hours
Medium Priority	A problem that is an inconvenience, but that does not prevent an activity from being done (possibly through the use of another computer).	3 days	5 days
Low Priority	A non-critical new installation.	7 days	10 days

Source: Neal & Gibson.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The Technical Systems coordinator and assistant superintendent of Strategic Planning develop performance targets for response time.	September 1998
2	The Technical Systems staff begins recording actual response times and accurate status information with the new work request software.	October 1998
3	The Technical Systems coordinator begins tracking response time and reporting performance against targets to the assistant superintendent of Strategic Planning.	November 1998

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

FINDING

SISD leaves computer virus protection up to the individual schools.

Computer viruses are destructive programs that can infect a computer and damage applications and data files. Most viruses are transmitted as hidden files or program components from computer to computer when files are shared. Undetected viruses can destroy data and damage productivity across the entire district. According to Strategic Planning, only two or three schools in the district use virus protection software. This is a particularly dangerous situation, given the district's network and the frequency with which files are passed from school to school.

Many types of virus protection software are available that can be installed on individual computers or on servers (the computers that maintain the district's computer network). Some programs check for viruses automatically; others require the user to activate the virus check.

For a school district, the most effective virus protection software would run automatically without user intervention. To be effective, the software should run on computers each time a file is read or saved. It should run on servers either on a scheduled basis or each time a file is read or saved. Finally, the software should run each time an individual tries to download a file from the Internet or e-mail to ensure that the file is virus-free. An effective software package also must support both the district's Macintosh and IBM computers.

Recommendation 75:

Purchase a district license for virus protection software.

The software should scan for infected files on each computer each time a file is accessed. It should also scan files on the servers each time they are accessed. Finally, it should be able to scan files that users download from the Internet or e-mail. All of this scanning should be done automatically. The software should protect both IBM and Macintosh computers.

The district should update this software on a regular basis to ensure it remains effective.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The coordinator of Technology Systems conducts a search for virus protection software.	April 1998 - May 1998
2	The coordinator of Technology Systems selects software.	June 1998
3	The district purchases virus protection software.	July 1998

FISCAL IMPACT

A districtwide license for virus protection software would cost about \$39,120. Since viruses change frequently, the virus protection software should be updated periodically.

This estimate is based on a common virus protection software package that costs about \$9.78 per computer for the initial purchase. An upgrade should be purchased after two years, but the cost of the upgrade is 20 percent lower than the initial purchase cost, or \$7.82 per computer. These estimates include technical support, updates, and upgrades, and assume that the district has about 4,000 computers.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Purchase virus protection software	(\$39,120)	(\$0)	(\$31,280)	(\$0)	(\$31,280)

FINDING

SISD has no disaster recovery plan and no backup equipment on which it can run its critical applications. This could result in lost productivity and leave the district unable to pay salaries and bills, make purchases, and conduct other critical functions.

The district does run partial backups daily and full backups weekly. The backup tapes are stored off-site, but they will be useful only if the district has functioning hardware on which to run the application.

The district faces several challenges in developing a disaster recovery plan. Purchasing backup computer equipment is expensive, and no other organization in the El Paso area has similar computer equipment that the district could use to run the critical modules of Pentamation.

The Strategic Planning Department is developing a disaster recovery plan and determining the most cost-effective ways of preventing a disaster and of resuming operation in the event of disaster.

Recommendation 76:

Develop a disaster recovery plan that ensures that critical applications can be operated in the event of disaster.

This plan should include recommendations for either purchasing or leasing backup equipment. Or, given the district's planned purchase of a new

server to run its new business application, the district should give priority to a server that would facilitate disaster recovery. In other words, it should give preference to a server for which the district either could find a backup partner in the El Paso area or for which a relatively affordable replacement can be leased or purchased. A backup server need only run the critical parts of Pentamation and its replacement; it would not need to be as big as the primary server. The district should include the need for a disaster recovery solution as a requirement in its RFP to replace Pentamation. Those who bid on the RFP would be motivated to provide a disaster recovery solution at a relatively low cost in order to increase their chances of winning the contract.

The Technical Systems coordinator should continue to assess options for disaster recovery. Once the necessary information has been collected, the coordinator should make a recommendation to the assistant superintendent for Strategic Planning and to the board.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The Technical Systems coordinator investigates disaster recovery options.	May 1998 - June 1998
2	The Technical Systems coordinator develops disaster recovery recommendations.	June 1998
3	The Technical Systems coordinator develops a cost/benefit analysis for the disaster recovery recommendations.	July 1998
4	The Technical Systems coordinator presents the analysis and recommendations to the assistant superintendent for Strategic Planning.	July 1998
5	The Technical Systems coordinator and the assistant superintendent for Strategic Planning present the recommendation to the board.	August 1998
6	The board approves the recommendations.	September 1998
7	The recommendations are incorporated into the district's budget.	March 1999

FISCAL IMPACT

The district disaster recovery plan could be developed with existing resources.

Chapter 9 PLANNING

The district's 1992-97 Technology Plan, as recently implemented, established an ambitious plan focused on hardware, networking, e-mail and Internet applications. **Exhibit 9-18** describes the needs identified in the plan and the programs or initiatives that were implemented to address these needs.

Exhibit 9-18

1992-97 Technology Plan Needs and Accomplishments

Need	Accomplishment
<p>SISD staff and students need training and equipment for training and applying the skills learned.</p>	<ul style="list-style-type: none"> • The Staff Development Incentive Program, begun in 1993, enables any instructional employee to obtain a multimedia computer with software interest-free using payroll deductions in exchange for 20 hours of training. • The District Training Lab provides classes in Computer Basics and Instructional Applications. Each year approximately 160 classes are offered, with 980 attendees. About 1,470 hours of training occurs in these classes. • Each campus develops its own schedule for technology training, including e-mail and Internet training. At least one day of required staff development addresses the use of computer technology. • SISD has offered several graduate-level classes in multimedia technology and the Internet in the K-12 classroom.
<p>Equipment is needed for teacher presentation of information using the computer in every classroom.</p>	<ul style="list-style-type: none"> • The 1994 Technology Bond allotment placed a multimedia computer in every classroom in the district. • Cabling supplied by the Technology Bond allotment provides direct access Internet into every classroom. • Scan converters were purchased for every elementary classroom as new TV systems

	<p>were installed.</p>
<p>Equipment in computerlabs at the middle schools and high schools needs upgrading.</p>	<ul style="list-style-type: none"> • Middle school labs were upgraded with 10 Base t (Ethernet) networking to the Internet. • All high school labs were placed on-line. • Continuous replacement schedule was developed to upgrade every 3-4 years.
<p>SISD should provide incentives to stimulate creative uses of technology.</p>	<ul style="list-style-type: none"> • Staff development incentive program was implemented as described above. • Credit classes offered in district from both the University of Texas at El Paso and New Mexico State University in technology applications. <p>El Paso and New Mexico State University in technology applications.</p> <ul style="list-style-type: none"> • Required training for e-mail. • Newsletter highlights creative uses of technology within the district.
<p>SISD needs increased communication resources, allowing for distance access through computer networks.</p>	<ul style="list-style-type: none"> • All campuses and facilities are now part of districtwide network. Every office desktop, library, and instructional classroom is on-line. • Every classroom has a multimedia computer with connections to e-mail and the Internet. • In May 1997, more than 12,000 district e-mail accounts existed, including 10,000 student accounts, 1,500 teacher accounts, and 500 staff accounts. • The district has list-servs available for each campus and department. Job announcements, training, and other information are posted. • There are telephones in every classroom on the new campuses and the same will be provided for each campus districtwide.
<p>SISD must provide for equity of technology resources among campuses of like grade</p>	<ul style="list-style-type: none"> • Technology bond allotment set a district standard, and instructed all campuses to meet this standard by the end of the 1996-

levels.	<p>97 school year.</p> <ul style="list-style-type: none"> • Every classroom in the district has one computer on-line to e-mail and to use the Internet. • All campuses have a TV and cable to the classroom. • All campuses are part of the districtwide area network with fractional T1 or better communication speeds.
<p>Research and development should aid in the district making informed choices and direction for technology efforts.</p>	<ul style="list-style-type: none"> • Many new positions within the district have added to in-house expertise (network administrator, technical system, etc.). • New ideas and products seen and discussed through the District Technology Committee. • The district adopts standards set by open architecture and industry analysis. • Campus autonomy in purchasing hardware and software is maintained within district standards.

Source: SISD Strategic Planning Department

In May 1997, the district convened a committee of students, teachers, administrators and community members to develop the Technology Plan for 1997-2002. While the previous plan focused on the hardware and networking the equipment, this plan focuses on the use of computers in schools and on staff training.

The committee met for three days. The first day was spent researching and identifying national, state and future trends and summarizing a set of philosophies and beliefs for the district. On the second day, the group developed a vision, a mission, and four major goals. For the third day, the group was divided into subgroups, one for each of the four goals. Each subgroup developed objectives for its goal and identified strategies needed to accomplish these objectives. Each strategy included a responsible party, a timeline, resources needed, assessment and date.

The committee developed the following vision for the district:

By providing advanced technological infrastructure and opportunities, the students, educators and community of Socorro Independent School District can utilize a variety of

resources to maximize academic performance and improve their well being. All members of Socorro ISD will be confident and competent in using technologies to meet their teaching, learning and productivity goals.

SISD will work in partnerships, locally and on a global level, with entities such as government agencies, libraries, hospitals, and businesses to ensure information sharing, support and resource development.

SISD envisions a day when community and education work in concert to fully develop the potential of all.

According to the district's mission statement, SISD is committed to using technology to provide an environment that assures optimal learning experiences to improve student performance; enhances quality teaching by providing the support, collaboration, training, and communication needed; maintains an infrastructure based on standards that will optimize the management of the information necessary for the schools' efficient operation; and creates and supports a local and global network in which all students, employees, families, and community members become lifelong learners and contributing members in a changing world.

The group arrived at the following four goals:

- SISD students will have access to intellectually challenging and developmentally appropriate instructional programs.
- Teachers and staff will be able to use technologies to meet their teaching, learning, and productivity goals.
- SISD will establish standards and coordinate administrative efforts to ensure efficiency and improve student performance.
- SISD community members will acquire the technology competencies necessary to be active participants in the information age.

FINDING

While the committee was thorough in its development of a vision, mission, and goals, the details of the Technology Plan have not been fully developed. Since the details were developed by four separate subcommittees, some are more complete than others. The subcommittees considered most of the key elements of a good plan, but the details are not specific enough and the plan lacks cost estimates. A general assessment of these elements is presented in **Exhibit 9-19**.

Exhibit 9-19

Assessment of SISD's Technology Plan 1997-2002

Elements the plan should have	What it has now	Areas for improvement
Strategy	General description of what the district would like to accomplish.	Strategies should be more specific and measurable.
Responsible Party	Positions responsible for accomplishing strategy.	The responsible party should be made as specific as possible. For instance, rather than referring to campus administrators, it should identify <i>which</i> administrator, such as the principal.
Timeline	General timeframes.	Again, timelines should be as specific as possible. A five-year plan should identify what should be accomplished for each year.
Evaluation/Outcome	Either a source of data that could be used for evaluation or the means by which the evaluation could be conducted.	While the identification of data sources is good, the plan should be more specific about what the evaluator should look for in the data source.
Cost Estimates	None	Cost estimates should be developed for each strategy.
Resources	General funding sources, materials, equipment, and things that have to happen.	Resources should be tied to cost estimates and should be more specific.

Source: 1997-2002 Technology Plan and Neal & Gibson

Exhibit 9-20 presents an example of the details that were developed for the plan. These strategies were developed for the first objective of the first goal.

Exhibit 9-20

Sample Details for One Objective in the Plan

<p>GOAL 1: SISD students will have access to intellectually challenging, developmentally appropriate instructional programs.</p> <p>Objective 1: Students will have increased access to communication and collaboration opportunities between and among other students and the global economy.</p>				
Strategies	Responsible Party	Resources	Timeline	Evaluation
Increase number of computers per classroom	Campus and district technology committees	State technology funds; district funds; grants	Continuous	District Inventory
Provide for an open lab at each campus	Campus administrators	Classrooms; grants	1997-98	District Inventory
Provide access to library resources at all workstations	District technology director	Money for upgrades; grants	1998-99	Network Status
Increase distance learning opportunities for students	District technology director	Technology Infra-Structure Fund Grant; other grants	1997-98	Class rosters; Distance Learning classes between campuses and with colleges
Assure alignment with TEKS	Campus administrators	Copies of Texas Essential Knowledge and Skills to all teachers	1998-99	Student performance
Provide student opportunities for the use of e-mail and the Web	Campus administrators	Open labs; teacher acceptance of student use of classroom computers	1997-98	Every student with an active e-mail account

Source: 1997-2002 Technology Plan

A good plan should include targets that specify strategies. For instance, rather than just "increasing the number of computers in each classroom;" the plan could say "add one additional computer to each classroom." Similarly, rather than identifying the timeline as "continuous," the plan should specify how many computers should be added each year. If the technology plan committee would rather leave the specific numbers to the schools, it should state that schools will identify the exact number and timeframes by which the computers will be added. As another example, rather than "increasing distance learning opportunities," the plan could specify the number of students it would like to see participate in distance learning or identify the number of distance learning classes to be offered to students.

The greatest shortcoming of the Technology Plan, however, is its lack of cost estimates. While its goals and strategies are noble, most of them will cost money. Of the 73 strategies in the plan, 62 of them identify grants as a necessary resource. It is unlikely that the district will find grants to fund each of these projects, so it will have to make some hard choices.

The district's technology committee has been reconvened to further refine the technology plan and develop cost estimates. The committee began this process in December 1997 and will conclude before the end of the school year so that its results may be incorporated in the budget. Some of the committee's work has been placed on hold pending the release of this report.

Recommendation 77:

Refine the new technology plan to include cost estimates and measurable objectives in the new technology plan.

The district should continue to refine the details of its technology plan and develop cost estimates. During this refinement process, the committee should ensure that strategies include specific targets; responsible parties identify specific people; timeframes identify specific dates; cost estimates accompany each project; and adequate resources are identified. Specific targets and timeframes would enable the district to monitor progress toward the plan's completion. Assigning specific people responsibility for elements of the plan would enable the district to hold individuals accountable for results. Finally, cost estimates would enable the district to weigh benefits against costs and make informed decisions about which tasks to pursue. Cost estimates also will make it possible for the district to incorporate these costs into the district's budget and to make the necessary ongoing financial commitments to funding technology.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	Technology committee develops cost estimates for technology plan.	December 1997 - March 1998
2	Assistant superintendent for Strategic Planning presents estimated budget for the 1997-2002 Technology Plan to the board for approval.	April 1998

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

Chapter 9

BUSINESS TECHNOLOGY

SISD uses several software applications to automate its business functions.

Exhibit 9-21 summarizes each of these applications.

Exhibit 9-21

Administrative Software in SISD

Application	Use	
Pentamation - Business Modules	<ul style="list-style-type: none"> • Payroll • Financial Accounting • Budgeting • Salary Negotiations • Vendor Bidding 	<ul style="list-style-type: none"> • Fixed Assets • Warehouse Inventory • Applicant Tracking • Business PEIMS • Human Resources
Pentamation - Student Modules	<ul style="list-style-type: none"> • Registration • Scheduling • Report Cards • Daily Attendance • Class Attendance • Student Inquiry Snapshot 	<ul style="list-style-type: none"> • Transcripts • Child Tracking • Medical System • Discipline • Student PEIMS
QUICKEN	Departmental accounting software	
SNAP	Food Services	
CRS Subfinder	Human Resources Substitute System	
Inlex	Library System	
Cronos Timeclock System	To track hours worked	
Medicaid Reimbursement	Special Education uses this for Medicaid reimbursements	
SEMS	Special Education uses this to track special education students	
PDAS	Human Resources Performance Evaluation System	
Manatee	Used by schools to track student activity accounts	
NCS Scantools	To scan class attendance and six weeks grades	

Reflection emulation package	For all machines needing access to the VAX or HP or IBM
Netscape	Internet Access
PINE	E-mail

Source: SISD list of administrative software

The majority of the district's business functions are automated through Pentamation. **Exhibit 9-22** summarizes the district's expenditures on Pentamation.

Exhibit 9-22

Pentamation Costs

Expense	Description	Cost
Hardware	System upgrades, network, etc.	\$158,609
Business Software	License fees	\$192,124
Student Software	License fees	\$139,345
Software Maintenance	Software assistance fees	\$30,000 - \$65,000 per year
Hardware Maintenance	Hardware maintenance costs	\$14,000 - \$31,000 per year
Custom Programs		\$50,000 per year
File Conversions		\$18,000
Training		\$50,870 over a two year period

Source: SISD Strategic Planning Department

As previously noted, SISD is in the process of purchasing a replacement for Pentamation.

FINDING

The district solicited significant input in developing its RFP to replace the Pentamation system, but it did not assess or streamline the district's processes to maximize the benefits and minimize the costs of the new business system. An assessment of functional requirements could save district staff significant time and, as a result, save the district money.

The district took several steps to develop its RFP. It used the original RFP that had been developed for Pentamation; examined RFPs issued by other Texas school districts for similar systems; and appointed committees of district staff to identify requirements for specific areas. The committees involved in developing the RFP included representatives from each of the district's major administrative areas and various schools and programs. The process also involved subcommittees for class attendance, daily attendance, scheduling, registration, and counseling, as well as a technical subcommittee and an applications subcommittee. In addition to the appropriate central office and special program staff, these committees included all attendance clerks, scheduling clerks, registrars, secondary counselors, and assistant principals. These subcommittees, which were open to anybody who was interested in attending, were given input but no vote in the final decision.

While the district made a laudable effort to involve the entire district in developing the RFP, several district staff members still told TSPR that they had no input in the process. More seriously, the district has not attempted to ensure all functional requirements and automation opportunities were identified or included in the RFP. No one has assessed individual district processes to identify how processes can be streamlined and how automation could support this streamlining.

For instance, given that every classroom has a computer connected to the district's network, the present manual attendance-taking process is unnecessarily time-consuming (**Exhibit 9-23**).

Exhibit 9-23

Attendance Taking Process

Actor	Action	Frequency
Technical Systems	Prints scan cards	Several times a year
Staff member from each school	Picks up the boxes of scan cards from the basement of the Education Center	Several times a year
Staff member	Distributes these cards to the	Several times a year

from each school	teachers	
Teacher	Takes attendance by writing in attendance book	Daily (several times a day for different classes)
Teacher	Fills in bubbles on attendance scan card	Daily (several times a day for different classes)
Teacher	Sends scan card down to administrative office	Daily (several times a day for different classes)
Attendance Clerk	Scans card into Pentamation	Daily (several times a day for different classes)
Attendance Clerk	Checks to ensure data scanned correctly	Daily (several times a day for different classes)
Attendance Clerk	Prints report of attendance	Daily (several times a day for different classes)
Attendance Clerk	Sends report of attendance to be verified by teacher	Daily (several times a day for different classes)
Teacher	Verifies attendance report	Daily (several times a day for different classes)
Teacher	Returns verified card to administrative office	Daily (several times a day for different classes)
Attendance Clerk	Makes corrections if necessary	Daily (several times a day for different classes)
Attendance Clerk	Runs attendance reports	Daily (several times a day for different classes)

Source: Neal & Gibson.

Clearly, most of these steps could be eliminated if teachers could enter attendance records directly into the school computer system. Automation of this process would enable teachers to spend more time teaching and

allow schools to cut the workload of attendance clerks. While the attendance subcommittee identified many functional requirements for the attendance module of the new system, it is unclear how streamlining the process will fit into the RFP and its evaluation process.

Other manual processes described throughout this report could be automated to save the district significant amounts of time and potentially could save the district enough money to offset the cost of the software.

While Strategic Planning has identified several streamlining opportunities including the attendance process, district schools do not seem eager to embrace these opportunities. Under Site-Based Decision Making, schools have the freedom to select many of their own operating procedures and processes, and many individuals may resist the large changes that automation requires.

Recommendation 78:

Perform process analyses and cost-benefit analyses to determine which requirements should be incorporated into the business system RFP.

The assistant superintendent for Strategic Planning and the coordinator for Administrative Applications should hold meetings with small groups of district staff to further identify procedural streamlining and automation opportunities. These groups should include the individuals who will be the direct users of the new system and should focus on high-volume processes. Opportunities identified in this report should be considered during this process. As a part of this study, individuals and departments should document their procedures, and use this opportunity to streamline processes and identify detailed requirements for the automated system.

Once automation opportunities have been identified, the district should perform a cost-benefit analysis to determine what should be included in the RFP.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent for Strategic Planning and the coordinator for Administrative Applications hold committee meetings to identify automation opportunities.	April 1998 - June 1998
2	Departments document procedures for high- volume processes to identify automation and streamlining opportunities.	April 1998 - June 1998
3	Strategic Planning and individual departments develop lists	June 1998

	of automation opportunities for potential inclusion in the RFP.	
4	The assistant superintendent for Strategic Planning and the coordinator for Administrative Applications conduct cost-benefit analyses to determine which requirements should be included in the RFP.	June 1998
5	The assistant superintendent for Strategic Planning and the coordinator for Administrative Applications include the new requirements in the RFP.	July 1998
6	The district issues the RFP.	August 1998
7	The district evaluates the responses to the RFP.	August 1998 - September 1998
8	The district selects a software package.	September 1998

FISCAL IMPACT

This recommendation can be accomplished within existing resources.

Chapter 9

INSTRUCTIONAL TECHNOLOGY

CURRENT SITUATION

In keeping with SBDM, schools across SISD each found their own ways to use technology to enhance instruction. Although the district provides a basic structure—such as a networked computer in each classroom, a computer lab, and training—schools have had the freedom to use the technology as they choose. The direction instructional technology takes at each school depends on its staff and students, their goals, and the level of technical expertise and technical creativity available.

For instance, while the district originally intended to have a computer in each classroom and a computer lab in each school, some schools are giving up their labs and distributing the lab computers into classrooms. Computers in classrooms may be used to connect to the Internet, work with standard programs like word processing, or run specialized instructional software for remediation, testing, or self-paced instruction. Some schools schedule classes of students to go to the computer lab for specific computer lessons such as computer literacy and keyboarding. Other schools use their labs as "universal labs." These labs are not used to teach specific computer lessons to individual classes; instead, students visit these labs throughout the day to use computer technology to build on what they learn in their other classes.

FINDING

SISD offers a computer purchasing program for its teachers that allows them to buy computers at a good price and pay for them over a two-year period through interest-free payroll deductions. Teachers who purchase computers through this program are required to take or teach 20 hours of computer training.

The program offers standard Macintosh and Windows computers. Beginning this year, teachers will be able to purchase laptops in addition to desktop models. The computers come with basic software (including word processing and spreadsheet programs) and teachers have the option to purchase compatible printers as well.

The first purchases from this program were made during 1993. To finance the program, each year the district takes between \$100,000 and \$200,000 out of its general operating fund to purchase the computers. As teachers repay the district, these payments are returned to the general fund.

This purchase program is not only a benefit to teachers, but encourages teachers to take and teach computer training classes. Further, evidence shows that individuals with home computers tend to be more comfortable with computers at work and therefore more apt to use them regularly.

COMMENDATION

The district has implemented a computer purchase program that allows teachers to purchase computers under favorable terms as an incentive to become more capable users of technology in the classrooms.

FINDING

SISD worked with the University of Texas at El Paso to develop and offer a course for SISD teachers on integrating computer technology into the curriculum. The course was intended to assist educators in understanding and appreciating computers, understanding how they can improve teaching, and developing the knowledge needed to adapt computer technology in their own courses.

Each teacher finished the class with a series of lessons that incorporated technology into the curriculum for their specific subject and grade level. The course also counted as one of four required for a certificate in instructional technology. Two classes of the course were offered during 1996-97, and about 40 teachers attended.

The district paid about \$300 for each teacher who attended. Teachers were responsible for associated fees and books of about \$100.

COMMENDATION

The district effectively used shared services to integrate technology into the curriculum.

FINDING

The Instructional Technology team is staffed by a single instructional technology coordinator. This individual works with the schools to assist them in using computer technology. The coordinator visits schools, produces a technology newsletter, organizes computer training, coordinates the program through which teachers can purchase computers, and organizes other technology meetings. The coordinator also manages the two list-servs, or e-mail groups that staff members can join. As noted previously, these e-mail lists are an easy way for educators to share ideas

and information, solicit input, or ask and answer questions related to teaching.

While the district is quite advanced technically, it could use an additional investment in staff to incorporate technology into the curriculum. For example, several schools still use their labs primarily to teach students keyboarding, computer literacy, and "drill and skill" exercises, rather than the use of word processing programs, spreadsheets, the Internet, and instructional software to enhance what is learned in other classes. These schools' current uses do not maximize the benefit of computer technology.

While many districts have found it difficult to use technology to support their curriculum, some districts like Laredo ISD have made a real commitment to the process. Laredo ISD has ten full-time instructional technology trainers. These trainers-four of whom work in central district labs, while six travel among the district's schools-provide teachers with software training and assist them in integrating computer technology into their day-to-day teaching programs. This staff is ten times larger than the SISD's commitment to the same tasks, despite the fact that Laredo has fewer computers than SISD staff, and few of them are connected to a network or the Internet.

While Laredo probably has more instructional technology staff than most other districts in the state, other districts like Pharr/San Juan/Alamo have two or three district-level instructional technology positions. Pharr/San Juan/Alamo has a computer education director, a computer education specialist, and a computer education technician/trainer.

Placing computers in the schools is only a first step. If the computers are not fully incorporated into the instructional program, the benefits of the investment are not fully realized.

Recommendation 79:

Create one new position on the Instructional Technology team to act as an instructional technology facilitator.

The instructional technology facilitator would work at the district level to assist schools in integrating computers into their curriculum and thus maximize the benefits of the district's investment in technology. This individual should be very familiar with the use of computer technology in enhancing the educational process and should have teaching experience.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The coordinator of Instructional Technology and the	April 1998
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	assistant superintendent for Strategic Planning develop a job description for the instructional technology facilitator position.	
2	Human resources posts the position.	June 1998
3	The coordinator of Instructional Technology and the assistant superintendent for Strategic Planning review applications for the position.	July 1998 - August 1998
4	The district hires an instructional technology facilitator.	September 1998
5	The district trains the instructional technology facilitator.	September 1998 - October 1998

FISCAL IMPACT

Assuming the new instructional technology facilitator is a teacher with some teaching experience, this individual should be able to be brought in at a salary of \$26,774. This is SISD's average salary for teachers with one to five years of experience. With benefits, the cost of the new position would be \$30,555.

Training for the facilitator should cost approximately \$1,600. This would cover the cost of four classes offered by the University of Texas at El Paso required for obtaining an instructional technology certification.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Hire an instructional technology facilitator	(\$30,555)	(\$30,555)	(\$30,555)	(\$30,555)	(\$30,555)
Provide training for facilitator	(\$1,600)	-	-	-	-
Total Savings (Costs)	(\$32,155)	(\$30,555)	(\$30,555)	(\$30,555)	(\$30,555)

FINDING

Teachers need additional guidance and support at the school to effectively integrate computer technology into the curriculum. This need was addressed in the district's 1997-2002 Technology Plan.

Most schools have an individual who serves as an informal technology expert. This individual is paid out of the school's budget like other teachers. This person often is the school's computer lab teacher, but lab teachers have no specific job descriptions or responsibilities and receive no specific training. As a result, the lab teachers' expertise and roles vary

greatly from school to school. In most cases, the technology expert can help with basic computer questions and some simple troubleshooting, but in many schools, this individual does not have the time or the expertise to help teachers incorporate technology into the curriculum.

Both El Paso ISD and Pharr/San Juan/Alamo ISD have designated a technology coordinator at each school. According to these districts' technology staffs, the coordinators have been effective in training teachers in computer-related topics and working with them on integrating technology. The district technology staff at both districts are trying to obtain stipends (additional payments) for these positions.

Recommendation 80:

Reassign an individual at each school to act as a school technology coordinator and modify the job description, provide training, and provide a stipend for these individuals

The district should require each school to create a school technology coordinator position, either as a new position or as a reassignment of an existing position. High schools and middle schools should each have their own technology coordinator; two elementary schools might be able to share one technology coordinator. This recommendation is in line with the district's Technology Plan, which recommends that each school create a dedicated technology coordinator whose primary responsibility is support and training for computer use.

The district should modify the job responsibilities for these individuals. Their new job responsibilities should include the following:

- assist with technology purchases and decisions
- troubleshoot
- identify available resources
- pass along information, research, and best practices
- ensure computers are backed up and protected from viruses
- encourage teachers to explore potential uses of technology
- train and work with teachers on how to integrate technology into their curricula.

The district must train these individuals to assist them in guiding and supporting their schools in the use of technology.

Finally, the district should provide additional stipends for these individuals.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The coordinator of Instructional Technology works with representatives from each school to develop job responsibilities	September 1998
2	Principals identify individuals for the positions.	October 1998
3	Individuals are reassigned as school technology coordinators.	December 1998
4	The board approves the stipend.	March 1999
5	School technology coordinators are trained.	January 1999 - July 2000

FISCAL IMPACT

This fiscal impact is based on the assumption that the district would reassign 23 currently employed individuals in the district as school technology coordinators, one at each of the schools, and that each would receive a stipend of \$1,000 a year. Pharr/San Juan/Alamo ISD is working to get instructional coordinators stipends of \$500 to \$1,200, and El Paso ISD is trying to get board approval for stipends of \$500 to \$1,500, depending on the size of the school and the amount of work required. These estimates also assume that the new instructional technology facilitator would provide most of the training, but that school technology coordinators also would receive some additional training by outside trainers and that this training would cost approximately \$400 per year per coordinator.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Provide stipends to school technology coordinators	-	(\$23,000)	(\$23,000)	(\$23,000)	(\$23,000)
Train school technology coordinators	(\$9,200)	(\$9,200)	(\$9,200)	(\$9,200)	(\$9,200)
Total Savings (Costs)	(\$9,200)	(\$32,200)	(\$32,200)	(\$32,200)	(\$32,200)

Chapter 10

FOOD SERVICES

This chapter examines SISD's Food Services Department in two sections.

- A. Organization and Operations
- B. Meal Participation

A successful food service operation must provide nutritionally balanced meals to schoolchildren in a timely manner, as cost-effectively as possible. It must maintain a safe, sanitary environment in all its kitchens and cafeterias. Finally, it must comply with federal and state regulations.

The review team found that, while the percentage of SISD students who qualify for free and reduced-price meals is high, participation rates are very low. In addition, the Food Services Department serves relatively few meals per labor hour compared to other districts, indicating that SISD's cafeterias may be overstaffed.

Background

SISD has 21 kitchens located in its school. Most schools have independent kitchens; Clarke Middle School and Sierra Vista Elementary share a kitchen, as does Montwood Middle School and Chavez Elementary.

The Food Services' Department is headed by a director; three field supervisors oversee the 21 kitchens. Each kitchen has a manager, and the middle and high schools also have an assistant manager. The administrative office has twelve employees plus the director of Food Services. In all, Food Services has 139 full- and part-time employees in addition to temporary workers in the kitchens.

Food Services actual revenues in 1996-97 were \$5,951,675, most of which represented federal subsidies for free and reduced-price meals (**Exhibit 10-1**).

Exhibit 10-1

Food Services Actual Revenues

1996-97 School Year

	Totals
Total cash sales	\$1,565,057
USDA donated commodities	\$323,088
State reimbursement	\$70,534
Federal reimbursement	\$3,775,055
Interest income	\$13,147
Surplus carry forward	\$204,794
Total Revenues	\$5,951,675

Source: SISD Food Services The Food Services budget for 1997-98 was \$6,155,583. In the past four years, the department's budget has risen by 30 percent (**Exhibit 10-2**). Overall student enrollment increased by 17 percent from 1994-95 to 1997-98, using 22,118 as current enrollment. From 1993-94 to 1996-97, enrollment increased 16.4 percent according to the Academic Excellence Indicator System.

Exhibit 10-2

Food Services Budget

1994-95 through 1997-98

	1994-95	1995-96	1996-97	1997-98	Percent increase
Payroll	\$1,869,644	\$1,885,668	\$2,070,087	\$2,275,789	22%
Contracted services	\$781,029	\$683,642	\$960,815	\$1,003,136	28%
Supplies and materials	\$2,061,023	\$2,154,425	\$2,653,202	\$2,836,060	38%
Other operating expenses	\$4,850	\$10,675	\$8,512	\$10,548	117%
Capital outlay	\$27,731	\$39,854	\$12,300	\$30,050	8%
Total	\$4,744,277	\$4,774,264	\$5,704,916	\$6,155,583	30%

Source: SISD Budgets, 1995-96 through 1997-98

In the 1997-98 school year, payroll accounts for 37 percent of the budget; contracted services, 16 percent; supplies and materials, 46 percent; and other operating expenses and capital outlays together comprise less than 1 percent of the budget.

Two kitchens serve as master facilities for other schools. The kitchens at Clarke/Sierra Vista and Sanchez Middle Schools prepare bulk items like taco meat, turkey, chili, soups, stews, and batter for baked items for the kitchens at Vista del Sol, Escontrias ECC, Hueco, and Horizon Heights elementary schools. SISD uses this procedure because its smaller kitchens are not equipped to prepare their own bulk items.

The district participates in federally funded U.S. Department of Agriculture (USDA) programs including the National School Lunch Program, School Breakfast Program, and Donated Commodities Program. All school food services in Texas must comply with TEA regulations regarding nutritional content and with state and local health codes.

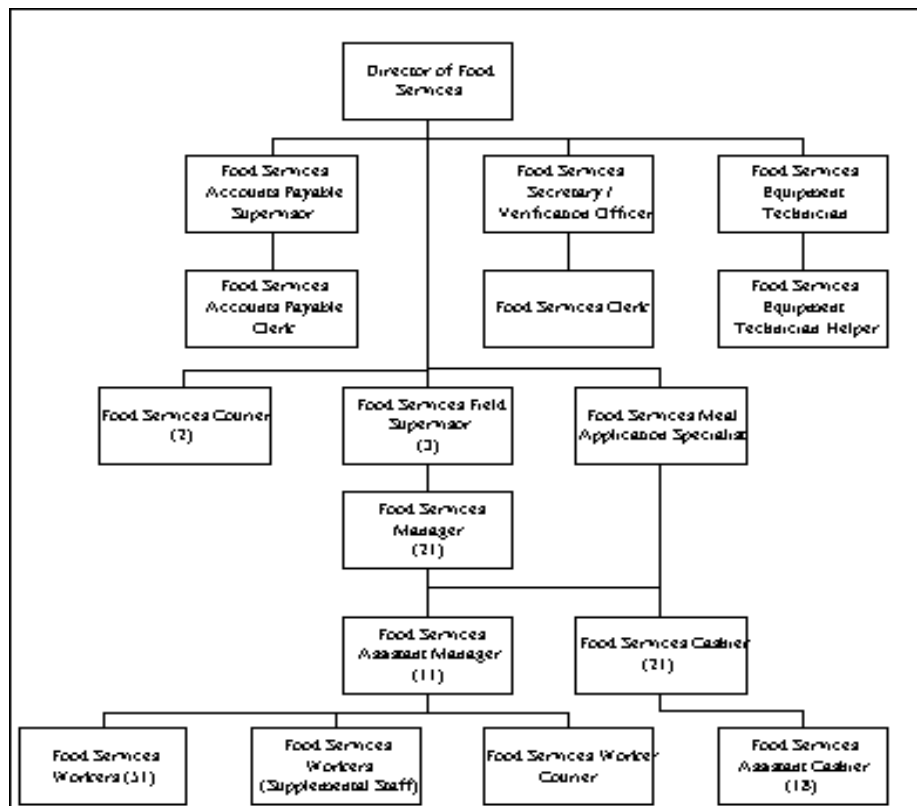
Chapter 10 ORGANIZATION AND OPERATIONS

CURRENT SITUATION

The director of Food Services reports to SISD's assistant superintendent for Support Services. Twelve support staff are headquartered at the central office: an accounts payable supervisor, an accounts payable clerk, a secretary, a clerk, a meal application specialist, two equipment maintenance technicians, three field supervisors, and two couriers. Each school kitchen is supervised by a manager. Each of the high schools and middle schools, including the two dual middle/elementary school kitchens, has an assistant manager. Each cafeteria has a cashier and most have an assistant cashier. **Exhibit 10-3** depicts the department's organizational structure.

Exhibit 10-3

Food Services Department Organization



Source: SISD Food Services

Food Services employs 112 full-time equivalents (FTEs), 27 part-time employees, and an average of 65 supplemental (temporary) workers. **Exhibit 10-4** outlines the major job duties of each of the department's administrative positions and its cafeteria managers.

Exhibit 10-4

Food Service Position Duties

Position	Duties
Food Services director	<ul style="list-style-type: none"> • Oversees all aspects of department • Develops and monitors budget • Optimizes use of personnel at all schools • Plans new facilities
Food Services secretary	<ul style="list-style-type: none"> • Secretarial duties • Bookkeeping • Verifies National School Lunch Program (NSLP) meal applications • Orders and maintains supplies
Food Services meal application specialist	<ul style="list-style-type: none"> • Coordinates distribution of meal applications • Approves NSLP meal applications • Supervises and trains cashiers
Food Services accounts payable supervisor	<ul style="list-style-type: none"> • Tabulates food service invoices and prepares purchase orders • Submits reviewed bids for advertisement • Corrects incorrect postings • Prepares and reviews catering billing • Arranges for contracted services
Food Services accounts payable clerk	<ul style="list-style-type: none"> • Tabulates food service invoices • Maintains data records of all payable transactions • Records corrections to accounts • Assists in obtaining bid quotes • Assists in arranging for contracted services
Food Services equipment technician	<ul style="list-style-type: none"> • Maintains all kitchen equipment on a scheduled and emergency basis

	<ul style="list-style-type: none"> • Develops preventive maintenance plan • Coordinates and monitors contract personnel as necessary • Obtains parts as necessary • Makes recommendations for equipment replacement and purchases • Assists in bid preparations for kitchen equipment
Food Services field supervisor	<ul style="list-style-type: none"> • Monitors all food services operations and supervises employees • Compiles weekly grocery orders for all schools • Conducts inspections of kitchens • Oversees production of monthly menus and food production reports • Provides training sessions for cafeteria staff • Manages cafeterias in the absence of Food Services manager • Assists in compiling budgets • Provides specifications for bids
Food Services manager	<ul style="list-style-type: none"> • Plans and directs food preparation and production according to menus • Submits weekly grocery orders and verifies receipt of orders • Plans employee work schedules and arranges for substitutes • Assures food temperatures are maintained at all times • Trains employees in safety procedures • Maintains production sheets and perpetual inventories • Verifies daily deposits

Source: SISD job descriptions; Interviews with Food Services personnel

FINDING

SISD Food Services makes substantial use of temporary workers, who are obtained through a contract with a temporary agency. In 1996-97, the district spent \$691,358 on these contract workers (other contracted services, such as refrigerator repair, comprised the remaining \$269,457 of the figure listed in **Exhibit 10-2**). The district pays \$6.72 an hour to the

temporary agency for these workers; of this amount, the temporaries receive a minimum of \$5.15. All employment taxes and any employee benefits are paid by the temporary service.

According to the district, it makes extensive use of temporaries because of the nature of food service operations, which are characterized by alternating periods of high activity (preparing for and serving lunch) and low activity. The high- volume times require a large staff, but the department does not have sufficient work during the rest of the day to justify employing full-time employees to cover peak times. **Exhibit 10-5** displays the staffing pattern for each school kitchen.

Exhibit 10-5
SISD Cafeteria Staffing Pattern
1997-98 School Year

School	SISD Employees	Temporary Staff
Americas High School	10	6
Montwood High School	12	4
Socorro High School	11	6
Clarke MS/Sierra Vista El.	8	7
Montwood MS/Chavez El.	9	6
Sanchez Middle School	6	4
Slider Middle School	6	3
Socorro Middle School	4	5
Helen Ball Elementary	5	3
Campestre Elementary	4	3
Cooper Elementary	6	2
Escontrias ECC	3	2
Escontrias Elementary	8	2
Hilley Elementary	5	3
Horizon Elementary	4	2
Hueco Elementary	4	1
Martinez Elementary	6	0
O'Shea Elementary	4	3

Rojas Elementary	7	1
Vista del Sol Elementary	3	2
Totals		

Source: SISD Food Services

The use of temporaries saves the district more than \$600 annually per half-time worker in salaries and benefits. **Exhibit 10-6** compares the cost to the district of a temporary, half-time employee to that of a similar district employee making minimum wage, for kitchens that operate 48 and 36 weeks each year.

Exhibit 10-6

Comparison of Cost of Hourly to Temporary Worker

Half-time Worker

	Hours per Week	Hourly Rate	Annual Pay)	Benefits	Total Paid Annually
Temporary worker (48 weeks)	20	\$6.72	\$6,451	\$0	\$6,451
District part-time employee (48 weeks)	20	\$5.25	\$5,040	\$2,099	\$7,139
Savings over 48 weeks					\$688
Temporary worker (36 weeks)	20	\$6.72	\$4,838	\$0	\$4,838
District part-time employee (36 weeks)	20	\$5.25	\$3,780	\$2,001	\$5,781
Savings over 36 weeks					\$943

Source: SISD; Accustaff Records

On average, 65 temporary workers are used in the kitchens each day. The kitchens in the district's high schools and the three elementary schools that

operate a single track are used 36 weeks a year; at all other schools, the kitchens are in use 48 weeks a year.

The kitchens that operate 36 weeks a year use an average of 22 temporary workers each day.

This amounts to a savings of \$20,737 per year over the district's cost for the same number of half-time employees. The remainder of the district's kitchens operate 48 weeks a year and use an average of 43 temporary workers each day. This amounts to savings of \$29,575 annually over the cost of half-time employees.

Commendation

The use of temporary workers saves the district more than \$50,000 each year.

FINDING

In the past three years, none of the school cafeterias has received a score on a health department inspection of less than 87 on a scale of 1 to 100, with 100 being a perfect score. Most of SISD's scores have been in a range between 92 and 96.

During routine, unscheduled inspections, the Food Services field supervisors conduct similar reviews to those conducted by health inspectors. This helps to ensure that the kitchens are always prepared for review and rarely have significant problems that warrant a write-up.

COMMENDATION

All school cafeterias consistently score well on health department inspection reports.

FINDING

As noted above, three field supervisors under the director of Food Services oversee 21 district kitchens. According to *School Foodservice Management* (Dorothy VanEgmond Pannell, 4th Ed., Van Nostrand Reinhold, 1990), one supervisor is appropriate for up to 15 kitchens; a supervisor and assistant supervisor should be adequate for up to 30 kitchens.

The Food Services field supervisors are responsible for overseeing the operations of the kitchens; filling in for cafeteria managers when they are absent from work; conducting training sessions for cafeteria staff

inspecting the kitchens; and relaying information between the kitchens and the department's central administration. In addition to these duties, each field supervisor orders groceries for all schools on a weekly basis; checks orders from individual schools against inventories and menus to ensure that they are ordering the proper foods in the correct amounts; and coordinates catering orders(**Exhibit 10-4**).

Until very recently, SISD Food Services had one field supervisor; in 1997-98, two additional field supervisor positions were created. The two new positions were filled in October 1997. According to the director of Food Services, the additional positions were created because the single field supervisor was overburdened. Due to the field supervisor's workload, internal inspections of the kitchens were not conducted as often as they should be. The review team also was told that the director's plan was to have the two new field supervisors spend most of their time in the school kitchens, while the third supervisor would devote more time to administrative tasks assigned by the central office.

This plan, however, contradicts the basic purpose of a field supervisor, who should be in the field. Furthermore, while the district's size and the duties assigned to the field supervisor may be too much for one person, industry standards indicate that two supervisors should be able to maintain a strong presence in the district's kitchens while continuing to perform administrative duties.

Recommendation 81:

Eliminate one field supervisor position.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Food Services, with aid from the assistant superintendent for Human Resources, eliminates one field supervisor position.	July 1998
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FISCAL IMPACT

Eliminating a field supervisor position would save the district about \$21,900 in salaries and benefits each year. This calculation is based on the assumption that the lowest-salaried of the three positions would be eliminated.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Eliminate one field supervisor	\$21,900	\$21,900	\$21,900	\$21,900	\$21,900

FINDING

While many processes carried out by the department are sound, most Food Services policies and procedures are not documented, exposing the district to potential losses and liability in the event of accidents. Also, as the district grows and personnel change, it becomes more likely that sound procedures may be abandoned or lost and that new employees will have to reinvent the wheel, so to speak.

For example, the department has no theft deterrence procedures. Each cafeteria manager is responsible for ensuring employee honesty. The former manager at one school held a meeting each afternoon immediately before people went home so that she could see whether they were carrying unusually large bags or hiding items under their clothes. The cafeteria's current manager is continuing this practice.

A second example involves the money handled by the head courier. The head courier is responsible for delivering change to the cashiers. While a previous head courier devised procedures that called for the money to be counted at the bank and again by the cashier, this procedure was not documented. When a new head courier was hired, she was told of the procedure orally.

Safety procedures also are undocumented; this could expose the district to legal liability in the event of an accident. Documented procedures can be used to prove that employees were instructed in safety procedures and therefore can reduce the district's chances of an unfavorable verdict in the event of a lawsuit.

Recommendation 82:

Document all Food Services policies and procedures and ensure that all Food Service employees and temporary workers sign a statement indicating that they have received copies of these documents.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent of Support Services works with the director of Food Services to document all Food Services policies and procedures.	December 1998
2.	The director of Food Services provides copies of all policies and procedures to each staff member and all temporary employees.	December 1998
3.	All staff and temporary employees sign a statement that they have received the written policies and procedures.	Ongoing

4.	The director of Food Services files the signed statement in each employee's personnel file.	Ongoing
5.	The director of Food Services confirms that all policies and procedures are documented and current.	Annually

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

Only three of SISD's 21 kitchens meet or exceed the meals per labor hour (MPLH) ratio recommended by *School Foodservice Management*. MPLH is used throughout the school food services industry to ensure proper staffing and is calculated by dividing the number of meals served by the total number of hours worked over a given time period.

The number of meals served is calculated using a standard industry methodology. Each lunch served equals one meal. Two breakfasts equal one lunch; therefore, the number of breakfasts served is divided by two to calculate a meal equivalent. Dollar sales for a la carte items are also divided by two, since industry standards equate \$2 in sales to one meal. It is important to note that SISD does *not* use this methodology, instead using a 1:1 ratio of dollar sales to meals served. This methodology artificially inflates the MPLH calculation.

Using the standard industry methodology to calculate meal equivalents, SISD's average MPLH is 11.9, with the highest MPLH (16.8) at H.D. Hilley Elementary School and the lowest (8.2) at Americas High School. Recommended MPLH levels are based on the average daily meal equivalents served by each kitchen, which is calculated by dividing the total meals served by the number of days the kitchen operated during the month. **Exhibit 10-7** shows the average MPLH at each kitchen, the recommended MPLH, and the daily reduction in labor hours needed to bring the kitchen in line with the recommended MPLH. The reduction in hours needed is calculated by dividing the total meal equivalents served by the recommended MPLH for the cafeteria, subtracting that number from the total hours worked for the month, and dividing that result by the number of days the kitchen operated during the month.

Exhibit 10-7

ISD Meals per Labor Hour (MPLH)

September 1-26, 1997

	Days Kitchen in Operation	Total Meal Equivalents Served	Total Hours worked	Meals per labor hour	Recommended MPLH**	Daily reduction in staff hours needed to achieve recommended MPLH
High Schools						
Americas HS	19	15,517	1,892	8.2	18	54.2
Montwood HS	19	24,270	2,413	10.1	18	56.0
Socorro HS	19	25,953	2,514.5	10.3	18	56.5
Middle Schools						
Clarke/Sierra Vista	19	21,162	1,989	10.6	18	42.8
Montwood MS/Chavez El	19	16,296	1,549	10.5	18	33.9
Sanchez MS	19	16,260	1,286	12.6	18	20.1
Slider MS	19	9,391	878.6	10.7	14	10.9
Socorro MS	19	12,403	1,181	10.5	16	21.4
Elementary Schools						
Helen Ball	19	12,209	956	12.8	16	10.2
Campestre	19	12,510	905	13.8	16	6.5
Myrtle Cooper	15	9,289	723.5	12.8	16	9.5
Escontrias ECC	14	6,426	412	15.6	14	0
Escontrias	19	16,495	1,379	12	18	24.3

H.D. Hilley	19	18,945	1,129.5	16.8	18	4.1
Horizon Hills	19	14,629	978	15	17	6.2
Hueco	19	9,343	667	14	14	0
Martinez	19	10,042	848	11.8	15	9.4
O'Shea Kelleher	19	13,585	1,056	12.9	17	13.5
Rojas	19	16,766	1,164	14.4	18	12.2
Vista del Sol	19	10,632	703	15.1	15	0
District Total		292,121	24,624	11.9		391.7

Source: Calculated from information provided by SISD Food Services

*** Source: School Foodservice Management, 4th Ed.*

SISD Food Services policy sets its target MPLH rates substantially lower than those recommended by industry standards. The target MPLH is documented on the form each cafeteria uses to report meals served. According to departmental policy, high schools are expected to maintain an MPLH of 10 to 12; middle schools and master kitchens are expected to maintain an MPLH of 12 to 14; elementary schools are expected to maintain an MPLH of 14 to 16; and satellite kitchens, that is, those served by master kitchens, are expected to maintain an MPLH of 16 to 18. Even with these benchmarks and the department's 1:1 dollars-to-meal ratio, many SISD cafeterias are overstaffed.

The kitchens prepare meals using a combination of commercially prepared items and items prepared from scratch. This year, the district began to receive preprocessed commodities (chicken nuggets and charbroiled hamburger patties) through the USDA Donated Commodities Program. In theory, the use of preprocessed foods should increase the district's MPLH rates, since, by using foods that require very little preparation prior to serving, fewer workers (and thus fewer labor hours) will be required to produce the same number of meals.

Recommendation 83:

Reduce departmental staffing by 391.7 hours each day to bring meal equivalents per labor hour into line with industry standards.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Food Services implements a hiring freeze and reduces the number of temporary workers used in the kitchens.	July 1998
2.	The director of Food Services adjusts the required meals per labor hour for all schools.	July 1998
3.	The director of Food Services and the management staff develops a plan to reduce labor costs.	July 1998
4.	The director of Food Services conducts a training session for cafeteria managers on increasing productivity and specific strategies to reduce labor costs.	October 1998
5.	The director of Food Services generates productivity/ MPLH records each month.	Ongoing

FISCAL IMPACT

Reducing staffing by 391.7 hours per day would save the district about \$621,000 each year and would bring the schools in line with MPLH standards.

These savings are calculated as follows: for each cafeteria not meeting the recommended MPLH, the number of hours worked by temporary workers would be reduced by the amount needed to meet the goal. The daily temporary hours eliminated then are multiplied by \$6.72, the hourly rate of a temporary worker. If the proposed MPLH cannot be reached even by eliminating all temporary employees, the additional hours to be eliminated are multiplied by \$6.85, the starting hourly wage plus benefits of a full-time SISD Food Services worker. The annual rate is calculated by multiplying the total daily amount saved (\$1,490.58 through reduction in temporary worker hours, and \$1,163.91 through reduction in 21.25 SISD FTES through attrition) by the total number of days the cafeterias are open each year (234).

It should be noted that increased participation also could achieve the proposed MPLH standards.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Reduce staffing by 391.7 hours to increase MPLH	\$621,150	\$621,150	\$621,150	\$621,150	\$621,150

FINDING

SISD processes all applications for free and reduced-price meals itself rather than precertifying students through the Texas Department of Human Services (DHS). Precertification in the free and reduced-price school lunch program is granted by the Texas Department of Human Services for families who receive food stamps or who participate in Temporary Assistance for Needy Families (TANF, formerly AFDC).

The 1990 U.S. Census reported that the average family in the El Paso metropolitan statistical area had four members. The eligibility qualifications for TANF state that recipients must have an annual income at or below the federal poverty guideline, currently \$16,050 for a family of four. SISD estimates that the average household income in the district is \$21,992, less than \$6,000 over the poverty guideline. Therefore, it is safe to assume that a substantial number of families in the district meet the standards for TANF. The fact that SISD has identified 70.4 percent of students as economically disadvantaged and therefore eligible for free and reduced price meals is an indication that most qualified students are being identified.

Families can submit a single application for all school-aged children. The Food Services meal application specialist estimates that calculating eligibility takes two minutes for each application; the process is described in **Exhibit 10-8**.

Exhibit 10-8

Free- and Reduced-Price Meal Application Processing

Step	Process
1	School cashiers collect applications for free and reduced-price meals from families and forward them to the Food Services meal application specialist.
2	The meal application specialist numbers each application and sorts the applications into groups of 100 for processing.
3	The meal application specialist or a temporary worker manually calculates each family's annual income from figures provided on the application.
4	If a family's annual income is less than \$400, the meal application specialist or a temporary worker calls the household to verify the income amount.
5	The meal application specialist records the results of the calculations and of the income verification, if applicable, on the form.
6	The meal application specialist or a temporary worker enters eligibility information into the Student Nutritional Accountability Program (SNAP).

Source: Food Services interviews

The district receives 14,000 applications for free and reduced-price meals annually. Food Services hires temporary workers to assist the meal application specialist in processing applications during the peak times of July and August. As with the temporary kitchen workers, the temporary service is paid \$6.72 an hour for each employee. District employees are encouraged to register with the temporary service so that they can assist with the application process after their normal work hours without accruing overtime.

The Food Services Department has chosen not to precertify families because many of the families will submit applications despite being precertified. According to the director of Food Services, in the past, the department precertified families using the DHS list, but found that 80 percent of precertified families continued to submit applications. Furthermore, the list provided by DHS had addresses from the previous year and if a family had moved, their new address was not reflected on the list. However, most districts previously reviewed by TSPR have reported no problems in using the DHS list, and the review team estimates that the time necessary to check an application for a family who has been precertified against the DHS list would be significantly less than the amount of time spent processing each application.

The review team estimates that checking the name of each applicant against a list of precertified families would take a maximum of 30 seconds for each application, thus saving 1.5 minutes for each application submitted by a family who has been precertified.

Recommendation 84:

Precertify families through the Texas Department of Human Services Food Stamps/Temporary Assistance for Needy Families program.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Food Services works with DHS to obtain a list of precertified families.	June 1998
2.	The Food Services meal application specialist begins to process applications by checking each application against the list of precertified families.	July 1998
3.	The meal application specialist disposes of those applications submitted by precertified families and processes all other applications according to standard procedures.	July 1998

4.	The director of Food Services submits reports to DHS as required.	July 1998
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FISCAL IMPACT

Precertifying families through the Texas Department of Human Services would save the district \$470 each year. TSPR estimates that 40 percent of all applications would be received from families already certified through DHS, for a total of 5,600 applications. Checking each application against the DHS list would save 1.5 minutes over the time needed to process an application; this would produce a total annual time savings of 140 hours. Checking each of the remaining 8,400 applications would add 30 seconds to the processing time for each application, for a total annual time spent of 70 hours. Thus, a total of 70 hours would be saved each year.

This would in turn reduce the number of hours temporary workers would be needed to assist the Food Services meal application specialist in processing applications, thus saving the district \$6.72 an hour in contracted services. Given district enrollment projections, which estimate an enrollment of 27,252 in 2000-01, significant time and money could be saved as more students enter the district.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Precertify families eligible for TANF	\$470	\$470	\$470	\$470	\$470

FINDING

Many functions in the Food Services administrative office are performed manually or are entered into multiple software applications.

The department's processes for processing purchase orders and invoices is manually intensive and involves double-entry. **Exhibit 10-9** provides an example illustrating the procedures used to process contracted service calls (work orders) and the resulting purchase orders.

Exhibit 10-9

Food Services Contracted Service Work Order Processing

Amounts more than \$100

Step	Action	
1	Cafeteria manager calls the Food Services clerk to report an equipment malfunction.	
2	The Food Services clerk writes up a work order and hand-carries it to the Support Services data entry clerk.	
3	The Support Services data entry clerk enters the work order into the computer and forwards it to the Food Services equipment technician.	
4	The Food Services equipment technician goes to the appropriate cafeteria to evaluate the problem.	
5	If the equipment technician deems the problem an emergency, he calls the Food Services accounts payable supervisor to advise that paperwork should be processed.	If the equipment technician deems the problem not an emergency, the normal procedures for a purchase order are followed.
6	The equipment technician calls the maintenance contracting company to set up a service call to the cafeteria.	
7	<p>The Food Services accounts payable supervisor manually completes a Contracted Services Requisition Form, including the following information:</p> <ul style="list-style-type: none"> * Vendor Number * Description of the problem * Account number * Work order number * Estimated cost of the job 	
8	The accounts payable supervisor enters the information from the Contracted Services form into Pentamation.	
9	The director of Food Services signs the contracted services requisition and returns it to the accounts payable supervisor for filing.	The director of Food Services electronically authorizes the record stored in Pentamation.
10	The director of Purchasing verifies that the funds are available to perform the work order and turns the work order into a purchase order.	
11	The purchase order is routed to the Food Services office through interoffice mail.	
12	Upon receipt, the Food Services accounts payable supervisor files the purchase order by vendor.	
13	When the work has been completed and invoiced, the Food Services accounts payable supervisor checks the invoice against the purchase order to ensure accuracy; corrections are made if necessary.	

14	The Food Services accounts payable supervisor attaches the invoice to the purchase order.
15	The director of Food Services signs the purchase order.
16	The Food Services accounts payable supervisor sends the purchase order with invoice to the Finance Department's accounts payable staff.

Source: Food Services accounts payable staff

Exhibit 10-10 outlines the process for paying food services invoices.

Exhibit 10-10

Food Services Invoice Processing

Step	Action	
1	The Food Services clerk receives the invoice.	
2	The clerk stamps the invoice with the date received and forwards to the Food Services accounts payable clerk for processing.	
3	The accounts payable clerk compares the amount of the invoice to the original bid received by the vendor.	
4	If the amount is more than the bid, the accounts payable clerk adjusts the invoice to coincide with the bid and calls the vendor to inform them of the change.	
5	The accounts payable clerk makes a copy of the invoice.	
6	The accounts payable clerk adds up the amount invoiced by each vendor from the original set of invoices.	
7	The accounts payable clerk adds up the amount invoiced by each vendor from the copies and compares that total to the total of the original invoices.	
8	If the two amounts are equal, the accounts payable clerk indicates that the invoice is authorized for payment.	If the two amounts are not equal, the accounts payable clerk researches for errors and makes necessary corrections.
9	The accounts payable clerk assigns the invoice a payment authorization number.	
10	The accounts payable clerk enters the following information into Pentamation: * Reference number (Payment authorization) * Vendor	

	* Account number * Invoice number *Amount of invoice	
11	When all invoices have been entered, the accounts payable clerk runs a report by payment authorization number.	
12	The accounts payable clerk prints a report of the total amount invoiced and compares that total to the amounts calculated in step 6.	
13	If the amounts are equal, the accounts payable clerk makes a copy of the report and attaches it to the payment authorization form.	If the amounts are not equal, the accounts payable clerk examines the report for errors and makes the necessary corrections. The corrected report is reprinted and attached to the payment authorization form.
14	The director of Food Services signs all packets authorizing payment.	
15	The accounts payable clerk sends the packet to the Finance Department for payment through interoffice mail.	
16	The accounts payable clerk enters the payment authorization information into Quicken.	
17	The accounts payable clerk files the copy of the paperwork by vendor.	

Source: Food Services accounts payable staff

Food Services personnel said that the information is entered into Quicken to facilitate queries and reports.

Recommendation 85:

When the processing of purchase orders and invoices is automated, eliminate the Food Services accounts payable clerk and include user training in query and report generation in the specifications for the replacement for Pentamation.

When the processing of purchase order and invoices is automated, the accounts payable clerk will not have enough work to justify the position.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The district purchases a replacement for Pentamation.	August 1999
2.	The Strategic Planning Department ensures all staff receive training in the operation of the new system.	August 1999
3.	The director of Food Services and the assistant superintendent of	August

	Human Resources eliminate the Food Services accounts payable clerk position.	1999
4.	The Food Services accounts payable supervisor eliminates the practice of entering information into Quicken.	February 2000

FISCAL IMPACT

Eliminating the Food Services accounts payable clerk will save about \$16,800 each year in salaries and benefits beginning in the 1999-2000 school year.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Eliminate the Food Services accounts payable clerk	\$0	\$16,800	\$16,800	\$16,800	\$16,800

FINDING

Although the district uses the Student Nutritional Accountability Program (SNAP), which is a management tool for food services operations, it does not use the program's automated nutritional component. The district performs no nutritional analysis of recipes on its own, relying instead on a review of menus by the Region XIX Education Service Center.

The meal service pattern used to determine nutritional content in all kitchens is the traditional pattern, which means that the district is not required to determine the nutritional content of recipes on-site and instead uses recipes for which the nutritional content has been determined for them. Since nutritional analysis is required of districts participating in the free and reduced-price lunch program, using the traditional pattern makes it critical that SISD Food Services follows the menus and recipes provided by Region XIX to ensure that students are receiving adequate nutrition from the meals.

Cafeterias, however, do not always follow the planned menus. Cafeteria managers said they regularly make substitutions to the menus for a number of reasons, such as incorrect deliveries from grocery suppliers and specific requests for a menu change from the school principal. When a menu is changed, the nutritional composition of the revised menu is not analyzed. As noted by district personnel, this analysis is not required by TEA, but it is a prudent practice nonetheless.

The automated nutritional component of SNAP would help Food Services to ensure that the nutritional content of its menus meets the required

guidelines for participants in the National School Lunch Program and the School Breakfast Program. While a number of automated programs provide these capabilities, it is logical to purchase the SNAP component since the district already owns and uses SNAP; Food Services staff is comfortable with the program; and SNAP already is supported by the district's Strategic Planning Department which is responsible for the districts technical functions.

Recommendation 86:

Purchase the SNAP nutritional analysis component.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Food Services includes the purchase of the SNAP nutritional analysis component in the Food Services budget for the 1999-2000 school year.	July 1999
2.	The director of Food Services issues a requisition to purchase the recipe and nutritional components of SNAP.	August 1999
3.	The Strategic Planning Department installs the new components on all appropriate computers.	September 1999
4.	The director of Food Services ensures that cafeteria managers and administrative food services employees are trained in the use of the SNAP nutritional analysis component.	December 1999
5.	The Food Services secretary enters all recipes into SNAP.	January 1999
6.	Cafeteria managers analyze the nutritional content of all menus before they are prepared to ensure that they meet federal guidelines.	February 1999

FISCAL IMPACT

The total one-time cost to the district is estimated at \$20,000 for the purchase of the SNAP component, to be installed on 25 workstations at \$800 each.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Purchase the SNAP nutritional analysis component	(\$20,000)	\$0	\$0	\$0	\$0

FINDING

The Food Service Department has no automated method for scheduling preventive equipment maintenance.

The equipment technician reported that preventive maintenance is done in an ad hoc manner.

Rather than conducting routine, scheduled preventative maintenance on all district equipment, the technician spends most of the time making emergency repairs.

The equipment technician estimates that in any given month, equipment in several district kitchens will be out of service for two to three days.

Recommendation 87:

Include the maintenance of food services equipment in the Facilities Department's maintenance work order system.

This system must track the maintenance history of individual pieces of equipment and generate work orders for preventive maintenance.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The directors of Food Services, Facilities, and Strategic Planning ensure that the existing work order system can generate work orders for preventive maintenance.	July 1998
2.	Facilities generates monthly reports on food service equipment maintenance requested.	August 1998
3.	Facilities generates work orders for preventive maintenance.	August 1998

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

Chapter 10

MEAL PARTICIPATION

CURRENT SITUATION

School meal participation rates are calculated by dividing the total number of meals served each month at each school by the number of days the school was in session during the month. This provides the average daily participation rate by school. Similarly, participation for regular, free, and reduced-price meals is determined by dividing the number of each type of meal served by the applicable number of eligible students. High participation rates are desirable for both SISD and parents. From the point of view of parents, having their children eat the lunches prepared by Food Services ensures that they will receive a warm, nutritionally-balanced meal at a very reasonable cost. For the district, high participation rates ensure that economies of scale, both in food and labor costs, are realized as more meals are prepared and served.

TSPR calculated SISD meal participation rates based on information provided by SISD Food Services. Food Services provided the total number of students in each school approved for free or reduced-price meals and the total number of students required to pay full price. In addition, Food Services provided the total number of meals served at each school in each month to students in each category (free, reduced-price, or paid) and the total lunch a la carte sales for each school.

SISD's free and reduced-price lunch participation rates for the 1996-97 school year are shown in **Exhibit 10-11**.

Exhibit 10-11

Lunch Participation Rate

1996-97 School Year

Grade Level	Participation Rate - Free Lunches	Participation Rate - Reduced-Price Lunches
Elementary	65%	59%
Middle School	54%	33%
High School	49%	31%

Source: SISD Food Services

SISD has the lowest overall lunch participation rate among its peer districts (**Exhibit 10-12**).

Exhibit 10-12

Lunch Participation Rates

SISD versus Peer Districts

1996-97 School Year

	Socorro	El Paso	Ysleta	Southwest	Edinburg	Pharr / San Juan / Alamo	Laredo	United
Average Daily Attendance (ADA)	19,935	66,481	47,384	10,123	18,573	19,683	21,656	19,200
Average Daily Participation (ADP)	8,843	32,785	23,710	5,412	12,409	14,147	15,424	13,495
ADP Percent of ADA	44%	49%	50%	53%	67%	72%	71%	70%

Source: Texas Education Agency, Child Nutrition Program District Profiles

SISD's breakfast participation rate in 1996-97 is shown in **Exhibit 10-13**.

Exhibit 10-13

Breakfast Participation Rate

1996-97

Grade Level	Participation Rate
Elementary	16%
Middle School	10%

High School	10%
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Source: SISD Food Services

Typically, breakfast participation rates are expected to be substantially lower than lunch rates.

Exhibit 10-14 displays the price of lunch for selected years between 1982 and 1997. The full price of lunch in elementary schools has risen by 33 percent in the last 15 years; in secondary schools the increase was 53 percent. The charge for elementary and secondary reduced-price lunches increased by 100 percent between 1982 and 1987, but has remained constant for the last decade.

Exhibit 10-14

SISD Meal Prices

1982, 1987, 1992, 1997

Meal Type	1982	1987	1992	1997
Elementary paid	\$0.75	\$0.75	\$0.90	\$1.00
Elementary reduced	\$0.20	\$0.40	\$0.40	\$0.40
Secondary paid	\$0.75	\$0.75	\$1.00	\$1.15
Secondary reduced	\$0.20	\$0.40	\$0.40	\$0.40
Adults	\$1.75	A la carte	A la carte	A la carte

Source: SISD Food Services

FINDING

SISD's food costs were 38 percent of the total Food Services budget in 1996-97. This is slightly less than the guidelines published by the New York Department of Education in 1987, which state that food costs, exclusive of commodities, should be equal to 40 percent of the budget. To keep food costs down, the district purchases most of their food products through the General Services Commission, and uses a co-op for commodity processing.

Where cost-effective or otherwise necessary, the district issues separate contracts for specific food products. Currently, SISD has separate contracts for bread, Mexican food, and snacks and beverages.

COMMENDATION

The district's food costs are below industry guidelines.

FINDING

SISD's participation rates for free and reduced-price lunches are extremely low (**Exhibit 10-15**).

Exhibit 10-15

Lunch Participation Rate by School

1996-97 School Year

School	Free			Reduced		
	Number Approved	ADP*	Percent of Approved	Number Approved	ADP	Percent Approved
High Schools						
Socorro	1,662	720	43%	232	63	27%
Montwood	897	467	52%	181	63	35%
Americas	487	288	59%	73	27	38%
All High	3,045	1,489	49%	487	153	31%
Middle Schools						
Socorro	617	400	65%	80	37	47%
Sanchez	656	408	62%	75	32	42%
Slider	405	158	39%	131	32	24%
Clarke	404	159	39%	87	20	23%
Montwood	0	0	0%	0	0	0%
All Middle	2,083	1,125	54%	373	121	33%
Elementary Schools						
Robert Rojas	692	453	65%	54	33	62%
H.D. Hilley	600	458	76%	67	44	66%
O'Shea Keleher	316	228	72%	98	57	58%

Campestre	625	406	65%	44	25	58%
Horizon Heights	605	449	74%	53	34	65%
Vista Del Sol	416	277	67%	81	52	64%
Hueco	427	327	76%	56	38	67%
Myrtle Cooper	322	214	66%	103	57	55%
Escontrias ECC	575	207	36%	56	22	40%
Escontrias	588	416	71%	60	41	68%
Benito Martinez	277	167	60%	120	59	49%
Sierra Vista	323	205	63%	133	78	59%
Helen Ball	483	313	65%	132	81	61%
Elfida Chavez	0	0	0%	0	0	0%
All Elementary	6,250	4,040	65%	1,057	625	59%
District Total	11,378	6,560	58%	1,917	894	47%

** Average Daily Participation rate.*

Source: SISD Food Services

To increase participation, some schools have initiated informal student and parent surveys; however, no districtwide surveys of meal preferences have been conducted. Other initiatives have included the establishment of snack bars in the cafeterias that sell nachos, ice cream novelties, and other a la carte items. Food Services staff called these snack bars highly successful, and said that the foods sold at the snack bars are in high demand among both students and adults. Since SISD does not include snack bar sales in its participation rates, however, this innovation has no impact on them.

Several additional factors may contribute to low participation rates at some schools. In the absence of formal preference surveys, it may be that many students simply don't like the food. Other factors might include the

presence of vending machines, which creates competition with the cafeterias, and the fact that high school campuses allow students to eat lunch off-campus.

The review team also learned that Food Services does not track participation rates at individual schools by month. Without such management reports, Food Services cannot quickly identify schools with low participation rates or effectively address issues causing low participation. By the same token, the lack of monthly rate tracking makes it difficult to identify best practices developed by schools with high participation rates and apply those practices to other schools in the district.

School Foodservice Management, lists the following expected participation rates for lunch (**Exhibit 10-16**).

Exhibit 10-16

Expected Participation Rates

By Grade Level

Grade Level	Participation Rate
Elementary School	70%
Middle School	60%
High School	50%

Source: Pannell, School Foodservice Management, 4th Ed.

Recommendation 88:

Implement strategies to increase student meal participation rates to 70 percent in elementary schools, 60 percent in middle schools, and 50 percent in high schools.

Since these benchmarks are for all students, it is logical to assume that students who receive free and reduced-price meals should participate at the same or greater rate.

These strategies may include surveying students and parents to determine preferences and preparing menus based on the results of those surveys, special promotions, and removing or relocating vending machines (see Recommendation 91).

Food Services also should develop monthly reports on participation rates and analyze these reports for ways to improve overall participation rates throughout the district.

Sales from Food Services' snack bar operations should be included in the calculation of paid participation rates at a ratio of \$2 in sales to one meal served. This would help cafeterias achieve target participation rates while offering cash-only items such as pizza and nachos.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Food Services director issues a districtwide survey to students and parents to determine meal preferences.	July 1998
2.	The Food Services director analyzes the survey results and makes changes to the menus and recipes accordingly.	September 1998
3.	The director of Food Services, in conjunction with the Strategic Planning Department, develops a system for monitoring participation at individual school cafeterias.	July-October 1998
4.	The Food Services director works with the assistant superintendent of Support Services to develop a proposal to close high school campuses during lunch.	August 1998
5.	The Food Services director and the assistant superintendent of Support Services obtain board approval to solicit community input on the proposal.	September 1998
6.	The district solicits community input on the issue of closing high school campuses.	October 1998
7.	The Food Services director and the assistant superintendent of Support Services bring the proposal to close high school campuses to the board for a vote.	December 1998

FISCAL IMPACT

If all of SISD's elementary, middle, and high schools were to achieve participation rates of at least 70, 60, and 50 percent, respectively, an additional \$320,861 in additional gross revenue could be generated annually. The total food (\$0.8495 per meal) and labor cost (\$0.485 per meal) of the additional meals (\$233,028) is subtracted from the gross revenues to calculate the net revenue of \$87,833 for 804 students.

This estimate was derived by determining the additional number of students eligible for free and reduced-price lunches needed to participate each day in order to achieve the target participation rate in each school,

and multiplying this number by the cost to the student per meal, if applicable, and/or the total federal and state reimbursement per meal received for each category.

Low meal participation rates also affect other sources of district revenues including commodities. Currently, SISD earns a 14.25 cent credit for each lunch meal served. If participation rates were increased to the minimum levels suggested, an additional 147,936 meals (184 serving days for 804 students), the district would earn an additional \$21,080 in commodity credits would be served each year.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Increase meal participation rates to target levels	\$108,913	\$108,913	\$108,913	\$108,913	\$108,913

FINDING

In some SISD elementary schools, only students who are eligible for free and reduced-price meals receive student identification cards. These schools are not complying with federal regulations that expressly prohibit schools from singling out these students in any way.

The point-of-sale terminals used throughout SISD Food Services can read the coded identification card. SISD's point-of-sale system can store information about prepaid accounts that parents can establish instead of giving their children cash to purchase meals.

The review team was told that all middle and high school students receive student identification cards, but that the decision to issue identification cards to elementary students is left up to individual principals.

Recommendation 89:

Issue student identification cards to all students and encourage the parents of students who pay for lunch to prepay meals via the card account.

Issuing identification cards to all students, especially elementary students, would eliminate parental worries about small children losing lunch money or spending it on non-nutritional snacks or items other than food.

Participation rates also might increase, since students whose parents prepay to meal accounts would be more likely to eat meals offered in the cafeteria.

Students who wish to continue paying cash for meals would be able to do so.

IMPLEMENTATION STRATEGIES AND TIMELINE

- | | | |
|----|---|-----------|
| 1. | Principals issue identification cards to all students at all schools. | July 1998 |
|----|---|-----------|

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

Vending machines are operated by SISD's individual schools. Their revenues go to school activity funds or to special events organized by parent-teacher groups. Contracts with vending machine companies vary from school to school, and placement of the machines and the items sold are determined by the principals and parent-teacher groups. Due to this arrangement, SISD has no figures on revenues generated from vending machines in its facilities.

Many other school districts both inside and outside of Texas have found that negotiating exclusive contracts for vending services has increased their profit margin. This does not mean that profits from the machines are in any way diverted from the groups operating the machines. Rather, it means that the district controls products sold and negotiates for the highest profit possible due to group volumes. In return, many vendors are willing to give the district bonuses for giving the vendor exclusive access to the schools.

Virginia's Chesterfield County's food service department took over the entire district's vending program. Chesterfield County's centralized program provides vending services for 62 sites, including 56 schools, and splits the vending profits 50/50 with the schools. Coca-Cola offered the Madison, Wisconsin school district a \$100,000 signing bonus and an advanced commission of \$515,000 for entering into a three-year contract worth an estimated \$1.5 million.

Several school districts in Texas have struck deals with soft-drink companies. Some of these districts include Tyler, Houston, Grapevine-Colleyville, Galena Park, Clear Creek, Katy, and Alvin. For example, Tyler ISD signed a 10-year exclusive contract with Pepsi, in which it received a \$500,000 bonus that was earmarked for technology-related projects.

If SISD were to negotiate an exclusive contract for vending services, its annual gross revenues could total \$1.4 million.

Recommendation 90:

Negotiate an exclusive vendor contract for vending machines.

In addition to providing increased revenue to the district, such a contract would enable Food Services to ensure that the placement and content of vending machines comply with state and federal guidelines.

In implementing this recommendation, the district must ensure that it does not breach existing contracts with vendors.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The Food Services director meets with the assistant superintendent of Support Services and the assistant superintendent of Finance for approval to begin negotiating an exclusive vendor contract for vending machines.	June 1998
2.	The Food Services director and the assistant superintendent of Finance seek approval from the superintendent and the board to initiate an exclusive contract.	June 1998
3.	The assistant superintendent of Finance notifies the principals of plans to negotiate an exclusive contract for vending machines.	June 1998
4.	The Food Services director works with the Purchasing Department to develop a request for proposal to be distributed to vendors.	June 1998
5.	The Food Services director sends a request for proposal to vendors.	July 1998
6.	The Food Services director and the director of Purchasing review responses and recommend a vendor.	September 1998
7.	SISD initiates its contract with a vendor.	October 1998

FISCAL IMPACT

Commissions paid to school districts by vending companies typically total 38 percent of gross revenue, of which 2 percent usually is allocated to food services departments as a management fee. Assuming SISD's machines realize gross revenues of \$1.4 million each year, the district's annual commission would be \$532,000. The Food Services Department would receive 2 percent of this amount, or \$10,640 per year, for contract management fees.

Since the district could not supply information about current revenue levels from vending sales, it is impossible to say how much greater this profit is than it has been in the past. Therefore no savings are calculated in this regard. However, in the first year it is reasonable to expect an estimated \$100,000 signing bonus.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Negotiate an exclusive vendor contract for vending machines	\$100,000	\$0	\$0	\$0	\$0

FINDING

TSPR observed that vending machines are placed in or near cafeterias in many SISD schools, potentially affecting meal participation. State and federal guidelines, outlined in the National School Lunch Program, clearly state that school food authorities shall prohibit the sale of foods of minimal nutritional value in the food service areas during lunch periods.

In addition, the review team observed that many of the items sold in the vending machines do not meet the federal *Dietary Guidelines for Americans*, which must be followed by districts participating in federal school lunch programs, or TEA guidelines because they are too high in fat, sodium, and sugar.

The director of Food Services told the review team that site-based decision-making effectively ties her hands regarding the placement and content of vending machines. The negotiation of an exclusive vending contract, as discussed in the previous recommendation, would allow the Food Services Department to ensure that SISD vending machines comply with state and federal regulations.

Exhibit 10-17 shows the types of items sold and the placement of vending machines in relation to cafeterias in SISD schools.

Exhibit 10-17

Vending Machine Placement and Contents

School	Placement of Machines	Items Sold
Socorro High School	Inside cafeteria 12' outside cafeteria 12' outside Bulldog Cafe	Water Coke, Pepsi Chips, cakes, honey buns, candy
Montwood High School	15' from cafeteria entrance	Coke, Pepsi, chips, donuts, cakes, cookies, candy, corn nuts, peanuts, crackers, pretzels
Americas High School	15' from cafeteria entrance	Coke and Pepsi, chips, candy, cakes, cookies, corn nuts, peanuts
Socorro Middle School	Inside cafeteria 20' outside cafeteria 60' outside cafeteria	Fruit juice Coke, Pepsi, chocolate, chips, donuts, cookies Coke, Pepsi, chocolate, chips, donuts, cookies
Sanchez Middle School	8 40' outside cafeteria	Coke, chips, candy, cookies, cakes
Slider Middle School	Inside cafeteria 50' from cafeteria entrance	Water Coke and Pepsi
Clarke Middle School	5' from cafeteria entrance 50' from cafeteria entrance 100' from cafeteria entrance	Chips, candy, cookies, cakes, donuts Coke and Pepsi Juice and water
Montwood Middle Schools	Inside cafeteria	Coke, juice, punch, water; chips, candy, cookies, corn nuts, peanuts, cake

Rojas Elementary	Inside cafeteria	Water, juice
Hilley Elementary	Inside cafeteria	Water, punch, chips, cakes, cookies, candy
O'Shea-Keleher	Inside cafeteria	Punch, juice, ships, corn nuts, cookies, cake, pretzels
Campestre	Inside cafeteria	Chips, candy, cookies
	20' from cafeteria entrance	Coke and Pepsi
Horizon Heights	Inside cafeteria	Punch
	10' from cafeteria entrance	Coke and Pepsi
Vista del Sol	Inside cafeteria	Coke, juice, chips, cookies, cakes
Hueco	Inside cafeteria	Water, chips, cookies, cupcakes, honey buns, candy
	20' from cafeteria entrance	Coke and Pepsi
Myrtle Cooper	Inside cafeteria	Punch, water
Escontrias ECC	Inside cafeteria	Chips, candy, cookies, cupcakes
	10' from cafeteria entrance	Water, chips, candy, cookies, cupcakes
Escontrias	Inside cafeteria	Juice, granola cookies, nuts, chips, cupcakes, chocolate
	10' from cafeteria entrance	Coke and Pepsi
Benito Martinez	Inside cafeteria	Coke, juice, punch, water, chips, pretzels, cookies, cake
Sierra Vista	30' from cafeteria entrance	Coke and Pepsi
Helen Ball	20' from cafeteria entrance	Coke, chips, candy, pretzels, cake, corn nuts
Chavez	Inside cafeteria	Coke, punch, water, chips, candy, cakes, crackers, peanuts, corn nuts

Source: SISD Food Services

Examples of healthy vending machine foods include yogurt, raisins, fruit, baked chips, low-fat cookies, pretzels, juices, and bottled water.

Recommendation 91:

Move vending machines away from cafeterias, turn them off during lunch times, and replace high-sugar, high-fat items with nutritious food and beverages.

Additionally, the district should establish a policy meeting federal guidelines regarding the placement and content of vending machines in schools.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	School principals move all vending machines away from cafeterias.	June 1998
2.	Principals turn vending machines off during lunch times.	June 1998 & ongoing
3.	The Food Services director specifies items to be included in the request for proposal for the exclusive vending machine contract.	June 1998
4.	The Food Services director works with the superintendent and the board to create a district policy regarding the placement and content of vending machines in schools.	June 1998

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

Chapter 11

TRANSPORTATION

Chapter Contents:

- A. Organization and Staffing
- B. Routing and Scheduling
- C. Fleet Management
- D. Management Policies

This chapter examines SISD's Transportation Department in four sections.

The Transportation Department provides daily transportation for more than 8,200 students for 234 days a year. While the department provides transportation in a cost-effective manner, it does not track its performance; performance monitoring would help the department maintain and improve its productivity. Moreover, the department operates from inadequate facilities and uses an aging fleet. Job descriptions do not reflect the department's requirements, making it difficult to assign positions to required duties and to address capital investment needs and cooperative activities with adjacent districts.

BACKGROUND

The Texas Education Code authorizes, but does not require each Texas school district to provide, transportation between home and school, from school to career and technology training locations, and for cocurricular

and extracurricular activities. The federal Individuals with Disabilities Education Act requires school districts to provide transportation for students with disabilities if the district provides transportation for the general student population or if disabled students require transportation to receive special education.

Texas school districts are eligible to receive state funding for transporting regular and special education students based on funding rules set by the Texas Education Agency (TEA). Local funds pay for transportation costs that the state does not cover.

For regular education, TEA reimburses districts for qualifying transportation expenses according to a prescribed formula. This formula is based on linear density, the ratio of the average number of regular education students transported daily to the number of miles traveled daily for those students. TEA uses this ratio to assign each school district to one of seven groups. Each group is eligible to receive a maximum per-mile reimbursement that differs from group to group. TEA reevaluates these group assignments every two years by recalculating linear densities with operational data from the first of the previous two school years.

During the 1995-96 and 1996-97 school years, SISD was in Group VI, the next-to-highest group, which entitled the district to a reimbursement of \$1.25 per mile for regular education transportation; the district's actual cost was \$2.14 a mile in 1995-96. TEA assigned SISD to Group VII, the highest category, in the 1997-98 school year based on operational data for 1995-96 when SISD reported a linear density of 2.40. In 1997-98, the state's reimbursement to SISD for regular education transportation will rise to \$1.43 per mile.

State funding for regular education transportation is limited to transportation for students who live two or more miles from the school they attend. The state does not fund transportation of regular education students living within two miles of their schools unless the students face hazardous walking conditions on the way to school.

All transportation for special education, except certain field trips, is eligible for state reimbursement of \$1.08 per mile. SISD's actual cost was \$2.78 per mile in 1995-96.

Career and technology education transportation costs are reimbursed based on the previous year's actual cost per mile for regular education transportation. In 1995-96, SISD received a state reimbursement of \$1.85 a mile for career and technology transportation.

Cocurricular trips take students to activities that are considered part of the

student's required curriculum. Cocurricular trips are regularly scheduled although they may not run every day. SISD refers to cocurricular trips as "activity routes." Most activity routes take place during the school day. The state does not provide funding for these trips, but some Medicaid reimbursement is available for transporting special education students to and from required health services through the federal Student Health and Related Services (SHARS) program. Extracurricular transportation takes students to after-school and weekend events, generally athletic events. No state funding is provided for extracurricular transportation.

Each school district is responsible for the capital cost of purchasing school buses. Districts may purchase school buses independently or through the Texas General Services Commission (GSC) under a state contract. Districts also may also choose to acquire buses through a lease-purchase process. In 1995-96, SISD purchased 17 regular education buses directly from a vendor through a lease-purchase agreement; in 1994-95, SISD purchased four regular and three special education buses through GSC.

Exhibit 11-1 compares SISD transportation operating statistics and costs for the 1995-96 school year with those of a peer group of Texas school districts. These districts are similar to SISD in the number of regular education students transported daily and the miles of service provided. All peers were either in the same linear density group as SISD, Group VI, or in Group VII, the group to which SISD is assigned for 1997-98.

**Exhibit 11-1 Ridership and Cost Statistics, SISD Versus Peer Districts
1995-96 School Year**

Peer District	Density Group	Regular Education			Special Education		
		Percent of Student Riders	Cost/ Mile	Cost/ Rider	Percent of Student Riders	Cost/ Mile	Cost/ Rider
El Paso	VII	13%	\$2.45	\$2.58	47%	\$4.16	\$15.85
Humble	VI	36%	\$1.57	\$1.45	18%	\$1.62	\$11.36
McAllen	VII	20%	\$2.02	\$1.48	14%	\$1.80	\$12.51
Midland	VI	39%	\$1.63	\$1.62	24%	\$1.59	\$10.91

Pharr/San Juan/Alamo	VI	48%	\$1.43	\$1.22	18%	\$1.64	\$11.19
Ysleta	VII	15%	\$4.63	\$2.17	29%	\$2.57	\$10.56
Weighted Peer Average		23%	\$2.03	\$1.75	30%	\$2.85	\$13.49
Socorro	VI	29%	\$2.14	\$1.65	23%	\$2.77	\$11.61

Sources: Costs and miles from TEA School Transportation Operation Report, 1995-96; annual riders from TEA School Transportation Route Services Report 1995-96; daily riders multiplied by 180 to estimate annual riders; daily riders for year-round programs multiplied by 55 to estimate additional riders; enrollment from TEA Academic Excellence Indicator System (AEIS) report.

SISD ranks fairly high on the share of regular education students it transports, and is well above the peer-district average. SISD's cost per mile for regular and special education transportation both are near the peer averages. SISD's cost for regular education is \$1.65 per student rider, compared to a peer average of \$1.75; its cost for special education is \$11.61 per rider, compared to a peer average of \$13.49.

TEA's *School Transportation Operation Reports and Route Services Reports* provide a three-year history of the cost, miles, and riders of district transportation services. These reports track all costs and miles related to transportation, including services not funded by the state. Ridership includes only students on state-funded routes. Between 1993-94 and 1995-96, SISD's total transportation costs rose by 12 percent; its total miles of transportation increased by 6 percent; and its number of riders rose by 48 percent (**Exhibit 11-2**).

Exhibit 11-2
SISD Regular and Special Education Transportation Costs, Miles,
and Riders
1993-94 through 1995-96

Item	1993-94	1994-95	1995-96	Percent Change
Total Operating and Capital Costs				
Regular Education	\$1,021,648	\$1,499,321	\$1,725,478	69%
Special Education	\$1,354,279	\$916,938	\$925,954	-32%
Total	\$2,375,927	\$2,416,259	\$2,651,432	12%
Annual Miles				
Regular Education	739,637	809,219	808,045	9%
Special Education	339,180	374,214	333,693	-2%
Total	1,078,817	1,183,433	1,141,738	6%
Annual Riders				
Regular Education	739,631	768,916	1,048,340	42%
Special Education	55,600	58,866	79,760	43%
Total	795,231	827,782	1,128,100	42%

Sources: TEA School Transportation

Operation Reports, 1993-96; riders from
TEA School Transportation Route Services
Report 1993-96; and SISD.

The exhibit indicates that SISD's costs for transporting regular education students increased by 69 percent between 1993-94 and 1995-96, while its cost for special education fell by 32 percent. This dramatic difference, however, is due to a change in the district's accounting procedures for allocating costs to these programs. The total 12 percent growth gives a truer picture of the overall increase in expenses.

SISD's year-round education (YRE) program has affected ridership trends. **Exhibit 11-2** above provides SISD's actual annual riders for the 1993-94 and 1994-95 school years as provided to TEA for its *TEA School Transportation Route Services Report*. Although this report was revised in 1995-96 to include only average daily riders, annualized ridership levels were estimated for this year to allow comparisons with previous years. The coordinator of Transportation also told TSPR that the TEA report double-counted special education riders for the extended year program in 1995-96; the numbers above reflect revised ridership counts supplied by the coordinator.

Exhibit 11-3 shows SISD's cost and ridership performance measures for the previous three years. Cost per mile reflects all transportation costs, including operating and capital, divided by all transportation miles for regular education, special education, activity routes, and extracurricular trips. Cost per rider reflects the same costs divided by annual riders for state-funded routes only. As such, this indicator provides a trend analysis but does not reflect the total cost for all riders. Between the 1993-94 and 1995-96 school years, the district's cost per mile increased by 5 percent while its cost per rider fell by 23 percent.

Exhibit 11-3
Cost and Ridership Performance Measures
1993-94 through 1995-96

Item	1993-94	1994-95	1995-96	Percent Change
Cost per Mile				
Regular Education	\$1.38	\$1.85	\$2.14	55%
Special Education	\$3.99	\$2.45	\$2.77	-31%

Total	\$2.20	\$2.04	\$2.32	5%
Cost per Rider				
Regular Education	\$1.38	\$1.95	\$1.65	19%
Special Education	\$24.36	\$15.58	\$11.61	-52%
Total	\$2.99	\$2.92	\$2.35	-21%

Source: Cost per mile from TEA School Transportation Operation Reports, 1993-96; cost per rider derived from TEA Route Services Report.

Exhibit 11-4 details SISD's transportation costs for the three years by object of expenditure. The increase in transportation costs over three years is due primarily to a 141 percent increase in "other" operating expenses. This category includes employee travel, registration and membership fees, and insurance. According to data provided by the district to the state's Public Education Information Management System (PEIMS), the majority of the increase in this category and more than half of the increase in total operating expenses is attributed to an increase in insurance costs, from \$94,204 in 1994-95 to \$242,733 in 1995-96. The increase in insurance costs, in turn, was due to the purchase of 17 additional buses in 1995-96.

Exhibit 11-4
SISD Transportation Costs by Type of Expenditure
1993-94 through 1995-96

Object	1993-94	1994-95	1995-96	Percent Change
Salaries and Benefits	\$1,629,386	\$1,679,178	\$1,751,169	7%
Purchased and Contracted Services	\$46,321	\$57,848	\$50,125	8%
Supplies and Materials	\$233,631	\$188,520	\$193,048	-17%

Other Operating Expenses	\$105,133	\$127,602	\$253,754	141%
Total Operating Expenses	\$2,014,471	\$2,053,148	\$2,248,096	12%
Capital Outlay	\$361,456	\$363,111	\$403,336	12%
Total Operating and Capital Costs	\$2,375,927	\$2,416,259	\$2,651,432	12%

Source: TEA School Transportation Operation Reports, 1993-96.

As noted at the beginning of this chapter, SISD receives state transportation funding for four categories of service: regular service to students living more than two miles from school; regular service to children living in hazardous walking areas; special education service; and transportation for students in career and technology programs. **Exhibit 11-5** illustrates SISD's state funding in each category over three years. Total state funding increased by 11 percent over the three-year period.

Exhibit 11-5
SISD State Transportation Funding

Funding	1993-94	1994-95	1995-96	Percent Change
Two-Mile Regular Program	\$526,771	\$518,270	\$556,881	6%
Hazardous Areas	\$23,166	\$28,215	\$21,075	-9%
Special Program	\$328,933	\$311,482	\$333,140	1%
Career and Technology	\$37,768	\$59,344	\$102,497	171%
Total	\$916,638	\$917,311	\$1,013,593	11%

Source: TEA School Transportation Route Services Reports, 1993-96.

Chapter 11

ORGANIZATION AND STAFFING

CURRENT SITUATION

The Transportation Department is part of the SISD Department of Administration and is headed by the coordinator of Transportation, who reports directly to the assistant superintendent for Administration. Transportation is responsible for providing school bus service for all schools and maintaining school buses and the general service fleet, which includes vehicles operated by other departments including Security, Grounds, and Electrical Systems.

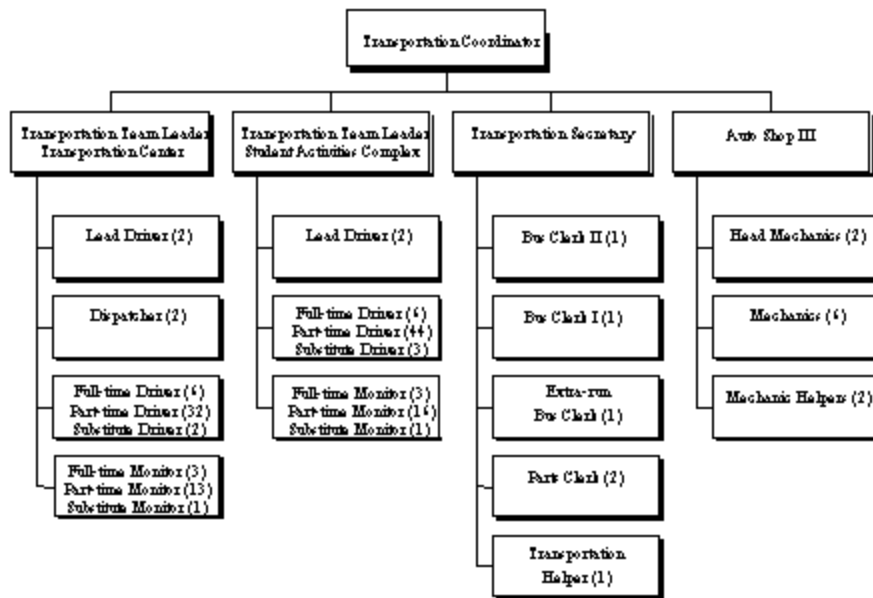
The Transportation Department operates from two facilities. The main facility is the Transportation Center, located south of I-10 on Middle Drain, adjacent to SISD's Support Services Complex. A satellite transportation facility is located at the SISD Student Activities Complex (SAC) located on Americas Drive north of I-10. The SAC also houses a football stadium and the Aquatics Center. The Transportation Center serves schools south of I-10 and is SISD's primary vehicle maintenance facility; the SAC facility serves schools north of I-10.

Transportation has 153 employee positions organized into four functional areas: two transportation areas (one at the Transportation Center and the other at SAC), a maintenance area, and a support services area. Each transportation area is supervised by a team leader. An individual classified as an auto shop III, or auto shop foreman in the auxiliary salary scale, heads the maintenance area. The Transportation secretary supervises the support services area. **Exhibit 11-6** illustrates the department's organization with the number of positions shown in parentheses by each job title.

Exhibit 11-6

SISD Transportation Department

September 1997



Source: SISD Transportation Department

Within each transportation area, a team leader supervises the work of drivers and monitors. Lead drivers assist each team leader with supervision and act as trainers for the drivers. Dispatchers also report to the team leader at the Transportation Center.

SISD employs full-time, part-time, and substitute drivers. Full-time drivers are guaranteed eight hours a day for 226 days a year, while part-time and substitute drivers are guaranteed four hours a day for 239 days a year. All drivers receive the same employee benefits and are considered permanent employees. Substitute drivers are not assigned to any route, but fill in as required.

The majority of monitors are employees that ride with the bus driver to aid special education students. Monitors help these students on and off the bus and maintain order during rides. Some monitors are placed on pre-kindergarten routes to assist the younger students. The same classifications and hour guarantees apply to the monitors.

FINDING

Under its Year-Round Education system, SISD conducts classes on 234 days each year. Students attend one of four different tracks that have staggered four-week intersession breaks during the year. During most weeks of the year, three tracks are holding classes. All tracks have

common intersessions during the two weeks around Christmas and the first two weeks in July.

The year-round schedule reduces the number of drivers and buses required by a traditional calendar, since the staggered schedules mean that all students are never in session at once, lessening the demand for transportation at any given time. Any changes to the track schedules or track assignments to schools affects transportation demands.

COMMENDATION

The year-round class schedule allows the Transportation Department to make more efficient use of its buses and drivers.

FINDING

The Department of Administration consists of six departments including Transportation. Directors head two or three of the six departments and lower-paid coordinators head the remainder. The Departments of Administration and Strategic Planning are the only departments with major functional areas managed by a coordinator. The remaining departments all have directors as functional managers.

The Transportation Department has 153 employee positions and a \$2.6 million annual budget. Its staff transports more than 8,200 students daily and maintains a fleet of 106 school buses and 118 support vehicles. In all, the responsibilities of the Transportation Department are greater than those of other SISD departments managed by a director. Directors head the transportation departments of SISD's peer districts.

The responsibilities of the Transportation coordinator is not in line with its classification or pay. This discrepancy reflects inadequate emphasis on the importance of the Transportation Department on the part of district administration. This lack of understanding about the importance of transportation to the district is evident in the fact that the fleet is aging and facilities are inadequate to meet departmental needs.

Given that Transportation accounts for nearly six percent of all district employees, and the fact that its employees are responsible for the safety and well being of 8,200 children each day, this department is very important to the district as a whole.

Recommendation 92:

Upgrade the coordinator of the Transportation Department to a director level position.

Upgrading the coordinator to director status would reflect the position's responsibility and authority more accurately. A director-level position would be in line with practices in other school districts, as discussed in the District Organization and Management chapter of this report. The district's organization chart should be corrected and updated.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The assistant superintendent of Administration, in coordination with the assistant superintendent of Human Resources, upgrades the coordinator of Transportation position to a director-level position.	April 1998
2	Assistant superintendent of Human Resources upgrades the position and increases the salary to reflect the new grade, and updates the district's organization chart accordingly.	May 1998

2. FISCAL IMPACT

Upgrading the coordinator's position to director level would increase the grade from the professional 2 category to professional 7, for an annual increase of \$4,591 including \$373 in benefits.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Upgrade coordinator position	(\$4,591)	(\$4,591)	(\$4,591)	(\$4,591)	(\$4,591)

FINDING

As already noted, the Transportation Department has two facility sites, each of which is headed by a transportation team leader. The team leader at the Transportation Center has 61 positions reporting to him, and the team leader at the SAC has 71. These team leaders belong to an auxiliary pay grade earning \$11.60 to \$17.39 an hour. The responsibilities of these positions include transporting more than 4,000 students daily, which are more in line with a professional grade position. SISD's Professional 2 grade classification includes coordinators for supervisory service, security, technical systems, and telecommunications.

The maintenance area is headed by an auto shop foreman, who supervises 10 positions with the responsibility to maintain 106 buses and 118 support vehicles. The foreman belongs to an auxiliary pay grade earning \$10.36 to \$15.54 an hour. Similarly classified positions are Locksmith III, Electrician III, and Plumber III. This classification does not reflect the supervisory and administrative responsibilities of this position.

The Transportation secretary has six individuals reporting to her, including three bus clerks, two parts clerks, and one transportation helper. The secretary's relatively low paraprofessional salary classification, which pays \$73.34 to \$110 per day, does not match her responsibilities.

Recommendation 93:

Upgrade the Transportation Department's team leader, auto shop foreman, and secretary positions.

The Transportation team leader positions should be upgraded to a Professional 2 classification, the maintenance area auto shop foreman position to an Auxiliary B8 classification, and the Transportation secretary to a Paraprofessional A6 classification. The district should review and update job descriptions, job responsibilities, and scope of authority for these positions.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The assistant superintendent for Human Resources, in conjunction with the coordinator of Transportation, reviews job descriptions for the Transportation job descriptions.	April 1998
2	The assistant superintendent for Human Resources reclassifies these positions to achieve more consistency in responsibility and authority.	June 1998
3	The district implements the job reclassifications and salary adjustments.	July 1998

FISCAL IMPACT

Reclassifying the Transportation team leader positions to a coordinator level position (Professional 2) will increase each position from a daily salary of \$97.44 to \$147.19. For two positions, this increase will result in approximately \$25,900 increased annual wages including 8.8 percent benefits.

Reclassifying the auto shop foreman in the maintenance area to an Auxiliary B8 classification will increase the annual salary by approximately \$1,500, including benefits, assuming that a five percent promotional raise is given.

Reclassifying the Transportation secretary to a Paraprofessional A6 level will increase the annual salary by approximately \$1,100, including benefits, assuming that a five percent promotional raise is given.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03

Upgrade team leader positions	(\$25,900)	(\$25,900)	(\$25,900)	(\$25,900)	(\$25,900)
Upgrade auto shop foreman position	(\$1,500)	(\$1,500)	(\$1,500)	(\$1,500)	(\$1,500)
Upgrade Transportation secretary position	(\$1,100)	(\$1,100)	(\$1,100)	(\$1,100)	(\$1,100)
Total	(\$28,500)	(\$28,500)	(\$28,500)	(\$28,500)	(\$28,500)

FINDING

SISD buses service 53 regular education and 28 special education routes. The district's peak daily requirement for drivers--the maximum number of drivers needed on a school day--includes these 81 routes plus 2 of 16 career and technology education routes and 1 of 38 activity routes that operate during the same times. The remaining routes don't operate during the peak times and do not require extra drivers or buses. The district's peak requirement, then, is for 84 drivers. SISD has 86 drivers, not including substitute drivers, with 10 positions vacant.

Recommendation 94:

Reduce the number of permanent driver positions to match the peak driver requirement.

The number of full-time and part-time drivers needed by the district is based primarily on the need to cover peak transportation requirements. SISD's total peak requirement for bus drivers is two less than the authorized level. Two of the 10 vacant positions should be eliminated to reduce the number of permanent driver positions to 84.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The coordinator of Transportation recommends a reduction in the number of positions to the assistant superintendent of Human Resources.	April 1998
2	The assistant superintendent of Human Resources reduces the number of permanent driver positions.	May 1998

FISCAL IMPACT

The elimination of two part-time permanent positions would save approximately \$13,150 annually for each driver (5.5 hours per day X

\$7.56/hour X 239 days per year plus \$3,200 in benefits), for a total annual savings of \$26,300.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Reduce permanent driver positions	\$26,300	\$26,300	\$26,300	\$26,300	\$26,300

FINDING

The Transportation Department has five substitute drivers to cover for permanent drivers that do not report to work. Driver positions may be unfilled on any given day for other reasons as well, such as an employee's recent departure or extra demand for drivers for field trips.

Based on information supplied by Transportation, high absentee rates (an average of 18 days per year for each driver) results in a need for approximately six substitute drivers per day. A high turnover rate (23 percent for 1996-97), plus the district's slow response to filling vacant driver positions (53 working days) results in a need for approximately four additional substitute drivers per day. An average of seven more drivers are needed to cover overnight field trips and field trips that overlap with peak bus operations. To cover for field trips, the driver requirement has been set at the highest number of overlaps that occur in a typical week. The highest rate of overlaps typically occurs on Thursday and Friday, with fewer earlier in the week.

On the average day, then, 17 driver work assignments will be unfilled: six due to absences, four due to vacant positions, and seven due to field trips. When permanent drivers are absent, the five substitute drivers, plus lead drivers, team leaders, administrative personnel, or mechanics must cover the unfilled routes. When any personnel other than substitute drivers are pressed into this service, they obviously must abandon their assigned duties, such as vehicle maintenance. Similarly, departmental management suffers when team leaders and lead drivers are not available to supervise drivers in the field. During peak bus operations, when field supervision is most critical, supervisory personnel sometimes drive routes to fill in for absent drivers.

One strategy to reduce the need for substitute drivers is to improve hiring and recruitment practices. As discussed in the Personnel Management chapter, 53 days are required to fill a vacant driver position, including eight days to notify Human Resources that a vacancy has occurred and 45 days for Human Resources to fill the position. The coordinator of Transportation said that he has difficulties in getting the Human Resources Department to recruit drivers. At the time of one visit by the review team,

the Transportation staff was preparing its own flyers to post at locations around town.

Other school districts use a variety of approaches to recruit drivers. Ector County ISD in Odessa applied a recruitment decal to 10 buses, and reported that 30 percent of its driver applicants resulted from the decal. The Dallas County school district recruits drivers by placing fliers in grocery stores and community colleges. Austin ISD recruits drivers by advertising in publications targeted at senior citizens and in church bulletins.

Another strategy to reduce the need for substitute drivers is to reduce the absentee rate for drivers. The absentee rate for SISD drivers is 7.6 percent, or more than 18 days a year. Drivers receive 12 paid days off during the year for sick or personal leave; the average driver is absent for an additional six days on unpaid leave.

Compared to other districts surveyed by TSPR, the Transportation Department's absenteeism rate seems high. Corpus Christi ISD, for instance, reports a 5 percent absentee rate, while Ysleta's is 3 percent.

Other districts have absenteeism reduction programs of varying effectiveness. Fort Worth ISD rewards perfect attendance with a certificate and uses attendance and other performance criteria to determine who gets to work limited summer routes. The district considers its program effective but is investigating monetary rewards as well, such as trading unused sick time for money.

Pasadena and Cypress-Fairbanks ISDs both use monetary incentives to reduce absenteeism. Pasadena drivers with perfect attendance become eligible for drawings to win gift certificates of varying amounts depending on their length of perfect attendance. Cypress-Fairbanks drivers receive \$200 each semester for perfect attendance, with the amount gradually decreasing to zero if more than two-and-a-half days are missed. Cypress-Fairbanks ISD's program has resulted in a 2 percent reduction in absenteeism.

Recommendation 95:

Increase the number of substitute drivers, improve hiring and recruitment practices, and establish an attendance incentive program for drivers.

Of the 17 necessary substitute driver positions, five already exist. Four additional positions could be filled by the four lead driver positions. Eight additional substitute drivers would be needed to ensure that all routes are

filled on a daily basis. However, this number could be cut in half if SISD implements improved recruitment and hiring practices and establishes an attendance incentive program for drivers.

By reducing the amount of time needed to hire new drivers to 20 days (a reduction of 33 days), the average vacancy rate would drop from 5.1 percent to 1.9 percent, eliminating the need for two substitute drivers. By implementing an attendance incentive program, the average number of absentee driver days could be reduced from 18 days to 12 days per driver per year, which would eliminate the need for two more substitute drivers.

Overall, SISD should create and fill four additional substitute drivers in permanent, part-time positions.

Transportation should immediately notify Human Resources at the time of, or before, a vacancy occurs. Human Resources should *prequalify* applicants through testing, background checks, and certification procedures and maintain a list of qualified candidates to fill vacancies as they occur. Human Resources should maintain a list of qualified candidates and notify them as vacancies occur.

Applicants should be recruited through announcements in neighborhood newspapers; flyers at grocery stores and retirement communities; contacts with public agencies involved in the Welfare-to-Work initiatives; and the use of advertising decals on the sides of the buses.

The district should offer recognition to drivers with perfect attendance by awarding them a certificate or plaque, and a cash incentive for perfect attendance or significantly improved attendance during the year. A \$200 cash award should be provided for perfect attendance during the year, \$100 cash for no more than three days absent, and a \$50 award for no more than six days absent.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The coordinator of Transportation recommends the creation of four additional substitute driver positions to the director of Human Resources.	April 1998
2	The director of Human Resources fills all substitute driver positions.	August 1998
3	The coordinator of Transportation institutes procedures to immediately notify Human Resources when a vacancy occurs.	April 1998
4	The coordinator of Transportation, in conjunction with the director of Human Resources, develops a recruitment strategy.	April 1998

5	The director of Human Resources develops and maintains a pool of applicants.	June 1998
6	The coordinator of Transportation develops and announces the attendance incentive program.	June 1998
7	The coordinator of Transportation implements the program.	September 1998

FISCAL IMPACT

Costs for the four substitute driver positions are estimated assuming each substitute driver works in place of an absent driver each day. Part-time, permanent drivers work an average of 5.5 hours a day, 239 days a year. At the entry-level wage of \$6.57 an hour, total wages for the four positions would be \$34,500 annually plus \$5,200 for benefits for a total annual cost of \$39,700.

The cost of improved recruiting efforts would come from publicizing available positions. The other costs could be covered by existing resources. Estimated recruitment expenses are \$500 a month for each month of the year, a total investment of \$6,000 a year. This investment would cover the costs for designing and printing flyers, announcements, and decals for school buses.

The incentive program is estimated to result in 10 percent of the district's drivers having perfect attendance; 15 percent of the drivers having no more than three days absent and 20 percent of the drivers having no more than six days absent. Eight drivers would receive a \$200 award, 12 would receive a \$100 award, and 16 would receive a \$50 award. Total cash awards for one year would be \$3,600.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Increase the number of substitute drivers	(\$39,700)	(\$39,700)	(\$39,700)	(\$39,700)	(\$39,700)
Improve hiring and recruitment practices	(\$6,000)	(\$6,000)	(\$6,000)	(\$6,000)	(\$6,000)
Establish an attendance incentive program	(\$3,600)	(\$3,600)	(\$3,600)	(\$3,600)	(\$3,600)
Total	(\$49,300)	(\$49,300)	(\$49,300)	(\$49,300)	(\$49,300)

FINDING

SISD's average turnover rate for drivers is 23 percent, which is relatively high; Ysleta ISD, for instance, has a 12.5 percent turnover rate, while Houston ISD's is 14.5 percent. The coordinator of Transportation and team leaders told the review team that the district's drivers are leaving to earn higher pay at other local school districts. **Exhibit 11-7** compares the hourly wage for drivers at school districts in El Paso County.

**Exhibit 11-7
Driver Wage per Hour**

School District	Minimum	Midpoint	Maximum
Ysleta	\$8.22	\$10.28	\$12.33
Canutillo	\$7.83	\$9.23	\$10.49
San Elizario	\$7.52	\$9.19	\$10.82
El Paso	\$6.65	\$9.16	\$11.65
Clint	\$6.61	\$8.60	\$10.56
Fabens	\$6.30	\$7.40	\$8.54
Peer Average	\$7.19	\$8.98	\$10.73
Socorro	\$6.57	\$8.22	\$9.87

Source: Telephone interviews with districts

The minimum driver wage at SISD is 9 percent less than the county average, although three districts pay

even less. Only Ysleta pays a significantly higher wage of \$8.22 an hour to its entry-level drivers.

Because of its Year-Round Education program, SISD offers a distinct advantage over other school districts in El Paso County. SISD's permanent drivers are guaranteed 239 days of work a year, compared to 186 at other school districts including Ysleta. A part-time, permanent driver at SISD will work an average of 5.5 hours a day for 239 days to earn from \$8,600 to \$13,000 a year. A similar driver at Ysleta ISD would earn from \$8,400 to \$12,600 a year.

Recommendation 96:

Promote the financial advantage of working a guaranteed 239 days each year to part-time drivers.

Drivers employed by SISD may not realize the advantages of working a guaranteed 239 days a year. By explaining the greater earning potential the district offers, SISD would change a perceived disadvantage to an advantage. A promotional campaign to highlight the value of the year-round program would help the district retain drivers and recruit new driver candidates. SISD could promote its year-round school curriculum as a significant pay incentive for drivers.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The coordinator of Transportation meets with the director of Human Resources to document the advantages and earning potential of the year-round transportation program.	April 1998
2	The coordinator of Transportation promotes the advantages of a guaranteed 239 days a year to existing permanent drivers.	April 1998
3	The director of Human Resources initiates a promotional campaign to recruit applicants for driver positions.	May 1998

FISCAL IMPACT

This recommendation could be accomplished within existing resources.

Chapter 11

ROUTING AND SCHEDULING

CURRENT SITUATION

SISD operates its 53 regular education routes on a "cluster-stop" basis. Stops are established for neighborhoods, and students are expected to walk a short distance to the neighborhood stop.

The typical regular education route serves more than one school and makes more than one trip. The first trip may serve an elementary or middle school with the second serving a high school. Some routes serve the same school more than once. The first trip arrives early, carrying the students on the free breakfast program, while the second trip brings the students who are not in the program.

According to the coordinator of Transportation, the regular education routes generally remain stable from year to year. Some adjustments to the routes, however, have been required to accommodate the district's growth. The coordinator of Transportation said that most of this growth is occurring north of I-10. For the 1997-98 school year, one new elementary school was added in this area. Transportation had to adjust the regular education routes as a result, requiring the addition of two new routes.

Special education students who are able to walk to a neighborhood stop travel on regular education routes. For those who are unable to do so, the district's 28 special education routes pick them up in front of their homes. The special education routes change every year, since they are affected every time a student moves within the district or a new student moves into the district. Routes also must be adjusted when students change schools, either because they move from elementary to middle school or middle school to high school, or because they move to a different school to obtain more appropriate programs. Two new special education routes were added in 1997-98 because of changes in enrollment.

Sixteen career and technology education routes take students to vocational training classes. The district's 38 activity routes serve the athletic program and are designed to take students home after practice at the end of the day. Some trips occur during the day, primarily to take students to tutorial programs. The costs for operating the activity routes are charged to the Transportation Department; neither principals nor students are charged for this expense.

All route planning is performed by the two Transportation team leaders. A bus clerk assists them with the special education routes. The

Transportation Center team leader is responsible for the routes south of I-10, while the SAC team leader handles routes north of I-10. All route planning and scheduling is done by hand, without computer support.

Extracurricular service is provided on an as-requested basis. These trips serve primarily to carry athletic teams and the band to sporting events, but also include field trips to various locations as part of a class curriculum.

FINDING

SISD is operating 53 regular education routes in the 1997-98 school year, of which only five serve a single school. Of the 28 special education routes, only three serve a single school.

The operation of staggered bell times makes these multiple trips possible. All elementary, middle, and high schools operate on the same bell time, which is different for each level of school. These times were established several years ago. Coordinated bell times allow buses to serve one school and have time to return to another school.

If the bell times were not coordinated and each school required its own bus route, SISD would require an additional 47 regular education buses and 30 special education buses. Each bus would require an additional driver and each special education bus would require an additional monitor. Additional mechanics would be required to maintain the buses and larger facilities would be required.

COMMENDATION

The coordination of bell times to allow multiple trips on most routes greatly improves the productivity of each bus route and lowers the cost of service.

FINDING

TEA recommends that special education students be on a bus for no more than one hour each way, but this condition is not mandatory. According to the TEA publication *Transporting Students with Special Needs in Texas: A Collaborative Approach*, a "review of OCR [Office of Civil Rights] cases indicates the length of ride for students with disabilities should be approximately equal to the length of ride for students without disabilities. Though some states have set the maximum recommended length of time for students with disabilities at one hour each way, Texas does not have a maximum travel time requirement." The Transportation Center team leader says all but two routes meet the one-hour criterion. The two that do

not take hearing-impaired students to El Paso ISD for classes, a route requiring a longer travel time.

COMMENDATION

The Transportation Department provides timely service to special education students.

FINDING

Transportation provides activity routes for about 800 students. Students often use these routes to return home following after-school functions. Other routes take students, mostly elementary students, to tutorial programs. Some routes take younger students to after-school programs. One route brings O'Shea Elementary students to Socorro High School on Wednesday mornings for free haircuts. Socorro High

School students learning to be hair stylists train on the O'Shea student "customers."

The district is not entitled to state reimbursement for activity routes. The routes are provided to allow students to participate in programs they would otherwise miss. Without a bus trip home after practice, many students either would have to drop out of after-school programs or walk long distances home, usually after dark.

COMMENDATION

SISD provides activity routes that permit greater student participation in cocurricular activities.

FINDING

At TSPR's focus group meetings, three of 16 total comments on transportation concerned students who have to walk to school in hazardous conditions. These students live within two miles of the school they attend.

As already noted, regular education students who live within two miles of school are eligible for transportation only if the walk to school passes through a hazardous area. The coordinator of Transportation said that he tries to strictly apply the rules established by TEA. These rules state "[a] hazardous condition exists where no walkway is provided and children must walk along or cross a freeway or expressway, an underpass, an overpass or a bridge, an uncontrolled major traffic artery, an industrial or commercial area, or another comparable condition."

During spring 1997, parents in the Quail Run subdivision complained that their children faced hazardous walking conditions en route to Slider Middle School. This complaint arose as a result of attendance zone modifications that changed the neighborhood's home middle school to Slider. The complaint centered on conditions requiring students to cross Zaragosa, a major thoroughfare and designated state highway.

The Quail Run neighborhood is within two miles of Slider Middle School, with the furthest point in the neighborhood being 1.9 miles away. The majority of the walking distance to the school has sidewalks in place. The intersection of Zaragosa and New World, where students must cross, has a traffic signal. An investigation by the coordinator of Transportation in April 1997 concluded that the neighborhood does not meet TEA's hazardous conditions guidelines; instead, a crossing guard was recommended for the Zaragosa and New World intersection. The neighborhood parents appealed the coordinator's decision to the district board, which granted the parents' request to implement a hazardous route.

The coordinator of Transportation implemented service for the neighborhood, but does not include this service as a hazardous route in the district's funding request to the TEA. The coordinator does not request funding because of his interpretation that this route does not meet the TEA definition.

However, Section 42.155 of the Texas Education Code states: "each board of trustees shall provide to the commissioner [of Education] the definition of hazardous condition applicable to that district and shall identify the specific hazardous areas for which the allocation is requested." TEA officials have told TSPR that a board resolution to provide service in response to conditions faced by Quail Run students meets TEA's requirements and that the service is eligible for state funding.

TEA places an additional requirement on its funding of hazardous routes. The funding allocation cannot be more than 10 percent of the funding allocation for regular education. In 1995-96, SISD received \$556,409 for regular education and an additional \$21,548, or 4 percent, for hazardous routes. Thus SISD does not exceed TEA's limitation.

Recommendation 97:

Report all hazardous route service requests to the Board of Trustees and allow them to determine if a board resolution to TEA is appropriate to increase state funding.

All routes implemented at board direction to address hazardous conditions are eligible for state funding up to the 10 percent maximum allocation.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The coordinator of Transportation reports all requests for hazardous route service from parents, principals, or community members to the board for consideration.	May 1998
2	The coordinator of Transportation includes all hazardous route service approved by the board in its report to TEA.	July 1998 Ongoing

FISCAL IMPACT

By designating Quail Run as a hazardous route, SISD can claim an additional 936 miles per year for state reimbursement for an increase of approximately \$1,300 per year ($\1.43×936). In addition, SISD is eligible for a one-time retroactive payment of approximately \$1,700 for services provided in 1996-97.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Report all hazardous route service requests	\$3,000	\$1,300	\$1,300	\$1,300	\$1,300

FINDING

Extracurricular trips are divided into two categories, district and non-district. Non-district trips are provided to non-SISD organizations for a fee. During 1996-97 the Transportation Department provided 3,058 district trips and 78 non-district trips. For district trips, principals are assessed charges of \$7 an hour and 50 cents per mile. For non-district trips, fees to non-SISD organizations are \$10 an hour and \$1.00 a mile.

For 1996-97, the average field trip was seven paid hours and 54 miles. Total billing for these trips was \$230,731 or an average of \$75 a trip. The charge is supposed to cover maintenance, fuel, tire use, and other district costs. However, the actual cost, at \$2.14 a mile, was \$116 a field trip or 55 percent higher than the amount billed to principals.

The average seven-hour field trip interferes with daily routes that take students to and from school. Most buses are available only between 8:30 AM and 1:30 PM, or in between the morning and afternoon routes, leaving five hours during the middle of the day when field trips can take place without interfering with the daily routes. Field trips of more than five hours, or held during hours that overlap with morning and afternoon routes, result in increased costs since an additional bus must be placed into service and an additional driver must be paid. The Transportation

Department does not assess a penalty for field trips that interfere with the daily service.

School principals are making decisions about field trips based on an incomplete understanding of the costs of their decisions to the district. By charging principals less than the actual cost of transportation, the Transportation Department may be encouraging more field trips than are justified by their costs.

Recommendation 98:

Increase the fee for field trips to reflect the actual cost of providing the service; charge a premium fee for field trips that interfere with daily school routes.

SISD should levy a flat fee for any number of hours up to five hours so long as the field trip does not interfere with peak school routes. A minimum charge of \$85 for up to a five-hour period between 8:30 AM and 1:30 PM is recommended. The \$85 charge is based upon lowering the average field trip length to five hours from seven hours and assumes a proportional reduction in the average cost of a field trip.

To discourage field trips at peak travel periods, a premium hourly charge should be levied on such trips. A charge of \$40 an hour is recommended for any hour or part of an hour that interferes with peak service before 8:30 AM or after 1:30 PM. This extra charge, set at approximately twice the normal per-hour cost, would act as a deterrent and would allow the Transportation Department to recover its costs for using an additional driver and bus.

The district should levy a \$20-an-hour charge for additional hours incurred at night or on weekends.

Exhibit 11-8 summarizes the recommended pricing structure, which is based on currently available information. If additional information becomes available, the pricing structures should be reviewed and updated on at least an annual basis.

Exhibit 11-8

Recommended Charges for District Field Trips

Service	Hours	Charge
Base Service	Up to 5 hours school days 8:30 AM to 1:30 PM	\$85 Flat Fee

Peak Service	Before 8:30 AM, After 1:30 PM	\$40 Per Hour
Off-Peak Service	Nights and weekends	\$20 Per Hour

Note: Peak charges apply for any hours operated during peak times and are in addition to the \$85 minimum charge.

Source: LKC Consulting Services, Inc.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The coordinator of Transportation institutes the higher fee structure for field trips.	June 1998
2	The principals are notified of the higher charges and the revised charges go into effect.	June 1998

FISCAL IMPACT

Based on 3,058 field trips, an average increase in charges of \$10 a trip on a five-hour field trip held outside of peak times, would increase revenue to the Transportation Department by \$30,580 annually. A charge to the individual principals would offset this increase in revenue. The net cost to the district would be zero. However, more prudent scheduling of field trips could result in some overall savings.

FINDING

Transportation provided 78 nondistrict field trips during the 1996-97 school year for the American Heart Association and other organizations not connected with SISD. These trips required 8,972 miles and 830 hours for an average of 115 miles and 11 hours per trip. Charges billed to non-district organizations were \$10,296, for an average billing of \$132 a trip.

Non-SISD field trips, on average, last four hours longer and require 61 more miles of travel than field trips taken by district groups. Based on the regular education cost per mile of \$2.14, the actual cost of each non-district field trip was \$246, or 86 percent higher than the billed amount.

While non-district field trips represent an additional revenue source for the district, current charges do not recover the full cost to the district of providing them.

Recommendation 99:

Increase the charges to non-district organizations for field trips to fully recover the district's costs.

The district should implement the pricing structure for field trips provided to non-SISD organizations reflected in **Exhibit 11-8**.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The coordinator of Transportation institutes the higher fee structure for field trips.	June 1998
2	Nondistrict organizations are notified of the higher charges and the charges go into effect.	June 1998

FISCAL IMPACT

The increase in rates for non-SISD field trips would approximately double the revenues to the Transportation Department. Assuming no change in the number of trips, an average non-SISD field trip charge would be approximately \$250, which would fully recover the average field trip cost of \$246. Seventy-eight field trips would raise \$19,500 or \$9,204 in additional annual revenue that should be used for Transportation Department improvements.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Increase charges for field trips	\$9,200	\$9,200	\$9,200	\$9,200	\$9,200

Chapter 11

FLEET MANAGEMENT

CURRENT SITUATION

SISD's bus fleet consists of 106 active school buses. An additional 15 buses have been inactivated and are used for spare parts. The district's buses use three types of fuel: gasoline, compressed natural gas (CNG), and diesel. The CNG buses also can operate on gasoline. Each bus is assigned to one of SISD's two transportation facilities. **Exhibit 11-9** shows the fleet mix assigned to each facility.

Exhibit 11-9
SISD Buses by Type and Location

	Transportation Center	SAC			
Fuel	Regular Education	Special Education	Regular Education	Special Education	Total
Gasoline	15	10	14	22	61
CNG	15	4	17	2	38
Diesel	2	0	5	0	7
Total	32	14	36	24	106

Note: CNG buses housed at the SAC use gasoline fuel only since no CNG fueling facility is nearby.

Source: SISD Transportation Department.

The administrative building for the Transportation Department is located at the Transportation Center, with offices for the coordinator of Transportation, the Transportation Center team leader, dispatchers, the secretary, and the administrative staff. Three maintenance bays are provided for the buses and the district's support vehicle fleet. Separate storage areas exist for tires and parts. Fueling stations are provided for gasoline and diesel fueling. Parking stalls are assigned for the buses fueled by CNG since these buses take longer to fuel and require special equipment.

A second transportation facility is located at the SAC, which is located about 10 miles from the Transportation Center. It is housed on the paved parking lot at the SISD stadium. A trailer at the edge of the lot provides office space for the SAC team leader and the lead drivers. The trailer does not have running water; all personnel walk about 75 yards from the trailer to the stadium for water and restroom facilities. Buses park on the lot near the trailer. No fueling takes place at the SAC; all buses fuel at a public gasoline facility located nearby. The SAC has no maintenance facilities except for a small upholstery area located at the rear of the concession stand in the stadium.

Maintenance employees work out of maintenance trucks and can only perform inspections and minor maintenance. The SAC team leader told TSPR that SAC maintenance activities consist of electrical work, such as battery and cable adjustments. Because SAC has no facility for draining fluids, maintenance employees cannot perform oil changes or similar maintenance.

FINDING

The district has a fleet of 106 buses and 118 support vehicles for a total fleet of 224. This fleet is maintained by nine mechanics: one auto shop foreman, two lead mechanics, and six line mechanics. The ratio of vehicles to mechanics is 25 to one.

Common practice in the transportation industry calls for a ratio of 20 to 30 vehicles per mechanic, depending upon the age of the fleet, the level of maintenance equipment available, and the mechanics' expertise. SISD is in the middle of this range.

COMMENDATION

SISD's Transportation Department employs an appropriate number of mechanics to maintain its fleet.

FINDING

SISD lacks a plan for fleet procurement and replacement. Although the coordinator of Transportation proposed a procurement schedule three years ago, it did not include a cost/benefit analysis and was never adopted. **Exhibit 11-10** shows the number of vehicles in SISD's active fleet by model age. The average age of SISD's fleet is 10.7 years for regular education buses and 8.2 years for special education buses.

Exhibit 11-10
Active Fleet Inventory by Model Year

Year	Regular Buses	Special Education Buses
1971-1977	19	8
1978	2	0
1980	2	1
1981	1	1
1982	2	0
1985	2	0
1986	2	0
1989	4	2
1990	3	5
1991	2	2
1992	0	2
1993	4	1
1994	0	4
1995	5	2
1996	20	0
1997	0	10
Total Fleet	68	38
Average Age in Years	10.7	8.2

No buses were purchased in 1979, 1983, 1984, or 1988.

Source: SISD Transportation Department.

SISD's 1996 and 1997 bus purchases were funded from the proceeds of a general obligation bond. These purchases were made directly from a vendor through a lease-purchase agreement to meet the needs of its rapidly expanding enrollment. As a result of the practice of buying a large number of buses in a single year, regular maintenance needs will occur at the same time, causing service backlogs. On average, however, the district has purchased three regular education buses and two special education buses each year over the past 15 years. This average constitutes a 21-year

procurement cycle. The most recent purchases have averaged \$52,500 for a regular education bus and \$37,500 for a special education bus.

An even procurement cycle that results in a consistent number of bus purchases each year allows school districts to better plan their capital expenditures, avoiding the need for large expenditures in one year. In addition, regular purchasing spreads out the fleet's maintenance requirements so that a significant portion of the fleet does not require engine overhauls in the same year. School buses typically have a useful life between 10 and 15 years. TEA recommends a 10-year depreciation cycle; most districts adopt a 10-12-year life for buses. With an aggressive maintenance program, however, buses can last up to 15 years.

With its current 21-year procurement schedule, SISD's fleet will age considerably each year. Although SISD does not keep maintenance records in sufficient detail to allow TSPR to determine maintenance costs per bus per year, transit industry data show that keeping buses in the active fleet for longer periods of time increases their maintenance costs each year. This is particularly true for the oldest buses. Based on transit experience and an average annual mileage of 11,304 for SISD buses, increased annual maintenance costs are estimated to be \$517 per bus in year 16, rising to \$679 in year 21. Total cumulative additional expenses for years 16 through 21 are approximately \$3,595 per bus.

The federal government revised its safety requirements for school buses in April 1977. These revised requirements increased the standards for the crash-worthiness of school buses, but did not apply to older vehicles; vehicles manufactured before April 1977 are not required to meet the more stringent standards. The "National Highway Safety Administration Guideline #17" by the U.S. Department of Transportation recommends "replacing, consistent with the economic realities that typically face school districts, those school buses that are not manufactured to meet the April 1, 1977 FMVSS [Federal Motor Vehicle Safety Standard] for school buses..." SISD has 27 buses in this category, or 25 percent of its fleet. Eight of the buses are special education buses and 19 are regular education buses. The continued operation of these buses exposes students to greater risks in the event of an accident than would newer vehicles.

The peak bus requirement is determined by identifying the maximum number of buses in operation at any given time. Substitute or spare buses are defined as those above the peak requirement.

Exhibit 11-11 shows the numbers of peak and spare buses.

Exhibit 11-11
Peak Bus Requirement Compared to Fleet Size

	Regular Buses	Special Education	Total
Regular Education Peak	53		53
Special Education Peak		28	28
Career and Technology Education	2		2
Activity Routes Peak	1		1
Total Peak Buses	56	28	84
Total Fleet	68	38	106
Spare Buses	12	10	22
Spare Ratio	21%	36%	26%

Source: SISD Transportation Department.

The peak bus requirement does not include any buses for field trips. Field trips are not regularly scheduled and when overlaps occur with peak service, spare buses are required. Spare buses improve service reliability by providing substitute buses to fill in when a breakdown occurs and allowing mechanics to work on buses. The most important factors affecting the required spare ratio are the age of the fleet, operating environment, maintenance programs, fleet mix, and training programs. Spare ratios typically range from 10 to 20 percent according to industry sources.

Recommendation 100:

Establish a regular bus procurement program to replace buses every 15 years, and retire the oldest buses in SISD's bus fleet.

A 15-year cycle is not ideal for SISD, given the condition of its maintenance facilities and its year-round school calendar. However, a 15-year cycle is a fair compromise between maintenance requirements and available funding and would be a significant improvement over the 21-year cycle now followed. As savings accrue from previous recommendations, SISD should adopt a more aggressive 10- to 12-year replacement cycle.

Given the recommended fleet size of 67 regular education and 34 special education buses, an even 15-year procurement cycle would call for the

purchase of five regular and two special education buses each year. SISD's high percentage of buses that do not meet the federal standards for crash-worthiness, however, warrants a more aggressive procurement schedule in the initial three years (**Exhibit 11-12**).

**Exhibit 11-12
1998-2002 Bus Procurements**

	Regular Buses	Special Education Buses	Total		
Year	Buses Purchased	Buses Retired	Buses Purchased	Buses Retired	Change in Buses
1998	6	7	4	8	-5
1999	6	6	2	2	0
2000	6	6	2	2	0
2001	5	5	2	2	0
2002	5	5	2	2	0

Source: LKC Consulting Services, Inc.

This procurement and replacement cycle assumes no increase in the number of required buses. Any increase in demand would require additional buses.

A 20 percent spare ratio is appropriate for SISD's regular and special education fleets, given their age and the condition of the district's maintenance facilities. A 20 percent ratio also provides a cushion for growth in demand. This spare ratio would require a fleet of 67 regular education and 34 special education buses for a total fleet size of 101.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The coordinator of Transportation develops a multi-year bus procurement plan that assumes a 6.7 percent fleet replacement each year except in the first three years, which have a more aggressive schedule.	April 1998
2	The district superintendent and board adopt a long-term bus procurement plan with replacements each year.	May 1998
3	The board adopts a five-year capital budget for bus purchase and replacement.	June 1998

FISCAL IMPACT

SISD's average annual bus purchases over the past 15 years are three regular education buses and two special education buses. The purchasing schedule outlined in **Exhibit 11-13** requires SISD to pay an additional \$52,500 for each regular education bus and \$75,000 for each special education bus above this level.

Selling the retired buses would raise an estimated \$500 for each bus produced before 1977 and \$1,000 for buses produced after 1977. The 15 buses in the inactive fleet should be sold in the first year at an estimated price of \$300 for each bus, based on recent sales of inoperable buses by Houston ISD.

Retiring buses that are 15 years old rather than 21 years old would save the district additional maintenance costs of \$3,595 for buses between the ages of 16 and 21. These savings would accumulate over time as the oldest buses are retired from the fleet. Maximum savings would occur in year 15, when the procurement cycle has completely changed from 21 years to 15 years.

Additional savings would be realized from the improved fuel economy of the newer buses, but these savings would be offset by higher insurance costs associated with newer buses.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Establish a regular bus procurement program	(\$232,500)	(\$157,500)	(\$157,500)	(\$105,000)	(\$105,000)
Retire the oldest buses	\$18,800	\$17,000	\$21,800	\$27,700	\$31,400
Total	(\$213,700)	(\$140,500)	(\$135,700)	(\$77,300)	(\$73,600)

FINDING

A good preventive maintenance (PM) program is critical to efficient fleet maintenance. By regularly checking vehicles and making simple repairs promptly, mechanics can catch minor problems before they develop into major expenses. Maintenance programs reduce fleet wear and tear and the number of breakdowns.

The Transportation Department has a PM program that inspects buses and support vehicles every 4,000 miles. The PM inspection calls for changing

the oil; replacing the oil filter; topping off all fluids; checking the brakes, belts, and hoses; and lubing the chassis. Most fleet operators schedule PM inspections for every 3,000 to 6,000 miles. The 4,000-mile interval is appropriate for SISD's fleet, and the inspections on the checklist cover the necessary maintenance services.

Maintenance personnel schedule PM checks by applying a sticker to the vehicle's instrument panel that reports when the next PM is due. The driver is responsible for submitting the vehicle for inspection at the appropriate mileage, but no procedures exist for maintenance personnel to identify an overdue PM if a driver forgets. Transportation does not maintain records to determine the number of PMs performed, whether they were performed on time, or whether buses required additional services outside of the PM checklist. No records exist, furthermore, to indicate the number of times a mechanic has to go into the field to repair a bus, or the number of wrecker calls made.

A good computerized vehicle maintenance information system (VMIS) can ensure the success of a PM program. A VMIS tracks the due dates for PMs, the cost of parts and labor, the services or repairs performed, and the amount of fuel consumed.

SISD uses two VMIS software programs. The parts clerk uses Microsoft Nutshell, version 2, to track parts costs. This program was purchased for about \$500 to track the parts used by each vehicle. The auto shop foreman has a separate, custom-designed database program that tracks PM inspections. These two programs are independent and do not share information.

Microsoft Nutshell has the ability to track maintenance hours by repair job, fuel usage, and next scheduled PM, and to determine whether PMs are conducted on time--all vital measures not currently tracked by the district. Unfortunately, the district does not use this program for this purpose.

Recommendation 101:

Fully use Microsoft Nutshell as a vehicle maintenance information system.

By using all of the features of Microsoft Nutshell, SISD could record data by bus, including preventive maintenance inspections, labor costs by function, parts costs by repair category, and fuel use, as well as performance indicators such as inspections completed on time, maintenance hours per bus, repair costs per bus including labor and parts, miles per gallon of fuel, miles between repeat repairs, and miles per major component before failure. Maintenance costs per bus could be tracked by

type of vehicle based on fuel type, age, length, or special feature such as air conditioning. Reports could be prepared to compare average miles per bus or to calculate average miles between roadcalls by type of bus or type of service.

This tracking capability would allow Transportation mechanics to determine the true cost of maintaining the fleet. The district could identify the most expensive vehicles to maintain and target them for retirement. By documenting unusual patterns, such as alternator problems on specific bus models, the mechanics could have the manufacturer perform warranty repair work. The VMIS reports also could highlight changes in fuel use and alert mechanics that a specific bus may need attention.

This recommendation would provide a tool to track and record more detailed information for each vehicle in the fleet. The two parts clerks would be the most appropriate individuals to enter information into the computer database. This data entry, however, would require more time than the clerks presently have available, since they frequently fill in for absent drivers. The recommended driver staffing changes, however, should reduce this interference substantially, allowing the parts clerks to maintain the VMIS database.

All mechanics must be able to obtain data and review reports from the database. To ensure the accuracy of the VMIS, however, only the parts clerks or a supervisor should be authorized to enter or change information in the database. Once the parts clerks enter the information from each work order as completed by the mechanics or the shop foreman, the work orders should be closed so that they can no longer be modified.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The coordinator of Transportation directs mechanics to record hours spent on each repair and drivers to record miles and fuel use for their vehicles.	April 1998
2	The parts clerk prints out list of vehicles due for PM checks and records hours, miles, and fuel use in Microsoft Nutshell.	Ongoing
3	The maintenance foreman loads Microsoft Nutshell into his computer, including appropriate reports to track production.	May 1998

FISCAL IMPACT

The additional reporting requirements can be accomplished within the existing resources.

FINDING

Transportation Center facilities are inadequate to operate and maintain the fleet. The building is too small for the staff assigned to the location. Heating and air-conditioning equipment is inadequate. The electrical system cannot handle the demands of computer equipment.

The parking lot is inadequate for the district's buses. The lot is unpaved and poorly maintained, making it difficult for drivers to maneuver buses into parking spaces after rain. The buses become dusty during dry conditions and muddy during wet conditions, yet the only washing facility available is a bucket and a garden hose.

The maintenance bays are unsuitable to maintain buses and the district's heavy-duty trucks. The roof over the bays is just 11 feet high and not tall enough to permit vehicles to be raised by portable lifts. Mechanics cannot raise a vehicle to perform underbody work. When buses must be lifted, mechanics perform the work outside. When work is performed outside, repair times increase because mechanics lack ready access to their tools and vehicle components. When repairs cannot be completed, buses must be moved out of the repair bay to allow another bus in. When buses are inoperable, they must be manually pushed out of the bay. Inclement weather slows service times further. Based on visits by the review team, mechanics waste an estimated 30 minutes each day due to facility conditions.

A total of 46 buses and 113 support vehicles are maintained at the Transportation Center. Transportation industry standards call for one repair bay for every 20 to 30 vehicles, with additional bays for tires, upholstery, and wash equipment.

Adjacent to the Transportation Center is the Support Services Complex, a former manufacturing facility purchased in 1995. This facility has more than 185,000 square feet and houses the Facilities, Grounds, Food Services, and Warehouse departments. The facility is not fully used; its northern end is vacant.

The coordinator of Transportation said the district previously considered moving the Transportation Department into the unused space at the Support Services Complex, but the move was postponed because the opening of new schools became a higher priority. While considering the move, the district determined that the building was suitable for housing Transportation activities.

Recommendation 102:

Relocate Transportation Center activities into the Support Services Complex to provide seven maintenance bays and appropriate offices.

This relocation could be accomplished at a modest cost. In addition to seven maintenance bays, Transportation would need office space to support staff functions. A more aggressive expansion that fully uses the available space at the Support Services Complex could be deferred until funds are available or the need becomes critical.

At a minimum, the existing Support Services Complex structure should be modified to accommodate office space for Transportation administrative personnel, lockers for drivers, monitors, and mechanics, a break room or vending machine area for drivers, and a separate lunch area for mechanics. Mechanics require a separate area so that they can remain in the shop area and avoid tracking grease and oil into other parts of the facility. A parts room also would be required.

Based on a fleet assignment of 159 vehicles, the center would need six repair bays as well as one additional bay for tire and upholstery work. Maintenance bay space requires overhead doors for each bay. A limited number of overhead doors are in place at the facility, but these appear old and unusable. Each of bays would need to be properly equipped.

Providing additional space in the complex for Transportation administrative personnel, drivers, mechanics, and a parts room would require additional walls, electrical cabling, and computer support within the parts warehouse. This would require an estimated 7,407 square feet of new space construction. Seven new overhead doors would be needed to permit buses to enter the building for maintenance.

IMPLEMENTATION STRATEGY AND TIMELINE

1	Transportation and Facilities Department develop conceptual design for renovation of the Support Services complex.	April 1998
2	Board solicits design bids.	May 1998
3	Board awards the final design contract.	June 1998
4	Transportation and Facilities Department approve final designs.	August 1998
5	Board solicits construction bids based on the final design.	September 1998
6	Board awards construction contract.	October 1998
7	Contractor completes construction on improved transportation facility.	January 1999

FISCAL IMPACT

Total costs for these improvements are estimated at \$15 a square foot for interior space plus \$1,000 for each overhead door. Each bay is estimated to require a minimum of \$10,000 in equipment. An overall 20 percent contingency has been added. The total one-time estimated cost, therefore, is \$225,726. At a 20-year life for the building improvements and straight-line depreciation, annual costs would be approximately \$11,300.

Each of the six mechanics stationed at this facility is estimated to gain back the thirty minutes of unproductive time. At an average wage rate of \$10.10 an hour, the improved productivity is estimated to be \$7,200 annually.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Relocate Transportation Center to Support Services Complex	(\$4,100)	(\$4,100)	(\$4,100)	(\$4,100)	(\$4,100)

FINDING

Sixty buses and five support vehicles are assigned to the SAC. The one mechanic and one mechanic helper assigned to the SAC can perform only minimal maintenance since the SAC has no covered work area and no facilities for draining fluids. Buses must travel ten miles to the Transportation Center for PM inspections. With each of the 60 buses requiring an average of three PM inspections a year, 3,600 miles are required annually to reach the Transportation Center. This requirement is reflected in the miles reported to the TEA. SISD reported "other" mileage of 109,988 in 1995-96, while most peer districts reported less than 5,000 miles. The coordinator of Transportation said the "other" miles included travel from the SAC to the Transportation Center for maintenance.

No fueling facilities exist at the SAC. Buses must travel more than five miles each way to reach their fueling station. For the 43 buses operating on routes daily, each is fueled approximately every two days. Over the 234-day school year, an estimated 52,322 miles are spent simply in traveling from the SAC to the fueling location.

No fence separates the buses at the stadium lot from the rest of the parking area. During October 1997, some students from a neighboring district broke into some buses. Two radios were stolen and two other buses were vandalized. The team leader responded by welding locks onto all of the buses, but the buses are still parked in the open.

Unfortunately, no other school districts have facilities near this area of SISD, making the notion of a shared facility impractical. Similarly,

moving this activity to the Transportation Center would increase the miles buses must travel, leading to greater costs.

Recommendation 103:

Provide the minimum level of capital improvements needed to support bus operations at the SAC and reduce bus travel to the Transportation Center.

The minimum requirement would include installing a water line to the trailer to provide running water and bathroom facilities for the staff. A chain link fence should be installed to provide security. A small maintenance shed should be constructed beside the trailer to provide shelter from the elements for mechanics. Based on a fleet assignment of 65 vehicles, a minimum of two repair bays should be constructed, along with recovery equipment for fluids. Storage space for parts and tires also should be built.

Additional space would be provided for upholstery, so that this function could be relocated from the stadium concession stand, and for administrative storage space, to free room inside the trailer for a bathroom. A small breakroom also should be provided, as well as a 4,000- gallon storage tank for unleaded gasoline.

IMPLEMENTATION STRATEGY AND TIMELINE

1	Board solicits bids on design contract for SAC improvements.	April 1998
2	Board awards design contract.	May 1998
3	Contractor completes final design.	July 1998
4	Board solicits construction bids.	August 1998
5	Board awards construction contract.	September 1998
6	Contractor completes construction on improved transportation facility.	January 1999

FISCAL IMPACT

At a minimum, improvements would require a building 50 feet long, 45 feet wide, and 18 feet high. At \$35 a square foot, this would entail a cost of about \$78,800. An additional \$12,500 would be needed to fence in one acre for bus storage, \$20,000 for maintenance bay equipment, and a maximum of \$30,000 for a 4,000-gallon, above-ground fuel storage tank.

With a 20-percent contingency, the total cost of this project would be about \$169,500, or about \$8,500 annually over a 20-year period.

Savings would be realized by eliminating the need for buses to travel 10 miles to the Transportation Center for oil changes and other PM activities. At the average cost per mile of \$2.32 for regular and special education routes combined, the district would save about \$8,400 each year. Savings from eliminating the need for travel to a fueling station are estimated at \$121,400 annually. Mileage savings for the first year would be about half this amount since improvements will not be completed until mid-year.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Provide minimal capital improvements at the SAC	(\$8,500)	(\$8,500)	(\$8,500)	(\$8,500)	(\$8,500)
Reduce travel requirements to Transportation Center	\$64,900	\$129,800	\$129,800	\$129,800	\$129,800
Total	\$56,400	\$121,300	\$121,300	\$121,300	\$121,300

Chapter 11

MANAGEMENT POLICIES

FINDING

SISD offers advertising on the sides of its school buses. This program began in the 1996-97 school year as a way to raise revenue for the district.

Up to eight advertising spaces, four on each side, are available on each full-size bus. Two spaces on each side are at the front, between the driver and the "Socorro ISD" insignia, and two are at the rear, between "Socorro ISD" and the rear bumper. Advertisements are attached as a decal applied directly to the side of the bus. No windows or warning signs are blocked by the advertisements.

The district has not adopted specific advertising policies other than TEA guidelines. According to the *TEA School Transportation Information Update* of March 1996, "no regulations currently exist which explicitly prohibit advertising on the outside or inside of school buses, so long as such advertisements do not compromise safety, ... endorse or promote political candidates or otherwise attempt to influence the outcome of any election that would violate Article 5, Section 5, of the General Appropriations Act or any other state or federal law." TEA advises districts to avoid "sin ads" for such items as alcohol and tobacco.

The 1997 Legislature, however, required the Texas Department of Public Safety (DPS) to develop regulations for the placement of advertising on school buses. DPS rules are anticipated in early 1998. By all indications, SISD will meet the DPS rules.

Advertising is available on 39 of the 106 buses in the SISD fleet. As of November 1997, ads have been placed on ten buses, with 29 spaces sold. The major advertisers are Coke and the Government Employees Credit Union. The coordinator of Transportation estimates the district would receive \$2,000 annually per bus if all eight advertising spaces on each bus are sold. These revenues go into the district's general fund.

The coordinator of Transportation said the community has not expressed opposition to the program. No opposition was expressed in any of the focus groups conducted as part of this performance review.

COMMENDATION

The Transportation Department has implemented an advertising program that is beginning to bring in additional revenues without community opposition.

FINDING

SISD transports some of its students to neighboring districts for special programs. For example, hearing-impaired students are transported to El Paso ISD's (EPISD's) Regional Day School for the Deaf.

SISD shares its responsibility for transporting hearing-impaired students to EPISD with neighboring school districts. SISD offers two routes to EPISD. Clint ISD students use the northern route; the district delivers students to a stop shared with SISD and SISD transports both its own and Clint ISD students to and from EPISD in the morning and afternoon. San Elizario ISD and Fort Hancock ISD students use the southern route. Both of these districts bring their students to SISD for transportation to EPISD in the morning. In the afternoon, San Elizario picks up the students and brings SISD's students home before continuing on to San Elizario and Fort Hancock. This arrangement is paid for through an exchange of goods and services. The districts exchange no funds.

COMMENDATION

SISD has developed an innovative shared-transportation approach for delivering hearing-impaired students to EPISD's school for the deaf.

FINDING

The Transportation Department uses the resources available at the Region XIX Education Service Center (ESC) to train newly hired bus drivers and to provide retraining to previously hired drivers. Before a driver can operate a bus, he or she either must be enrolled in or have passed a 20-hour Region XIX bus safety course.

Drivers are allowed to drive a bus before successfully completing the safety course because the course typically is offered only three to four times during the school year. Drivers are hired throughout the year and the Transportation Department does not wait until the next course is offered since the department must fill its open positions. The new driver must complete an SISD course, however, before driving a new route.

The periodic nature of the Region XIX course presents a disadvantage to all school districts that hire drivers throughout the school year. The timing of driver hiring is not coordinated with the course offering. Drivers are hired when vacancies occur. If a vacancy occurs shortly after the course

has been offered, the new driver may operate a bus for some time before receiving training. In SISD's case, the disadvantage is even greater since SISD operates on a year-round basis.

Although assigning drivers to routes before they receive training is within existing legal requirements, the practice exposes the district to public criticism if one of these drivers is involved in an accident.

Recommendation 104:

Coordinate with surrounding districts and approach the Region XIX Education Service Center to offer a monthly or bimonthly driver training course.

The Region XIX ESC is the appropriate location for a driver-training course. SISD and surrounding districts should formally request that the ESC offer this training on at least a monthly or bi-monthly basis to all school districts in the area. The increased frequency of the training will reduce the time in which new drivers go without training.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The superintendent contacts superintendents of neighboring school districts and arranges a meeting with the director of the Region XIX ESC to request more frequent training.	April 1998
2	The Region XIX ESC implements a revised training schedule.	June 1998

FISCAL IMPACT

This recommendation could be implemented without any fiscal impact to SISD.

FINDING

The Transportation Department purchases several types of items on a recurring basis, such as fuel, school bus parts, and tires. As a moderately sized school district, SISD does not receive the same bulk discounts it would if it made purchases with other districts. Combining purchases with neighboring school districts and other transportation providers such as Sun Metro could result in improved buying power and lower costs.

SISD's fuel price is based on a bid awarded in 1993. This price is 86 cents for 130,000 gallons of unleaded gasoline annually and 80 cents for 45,000 gallons of diesel fuel annually. Larger purchasers can obtain significant

discounts on fuel. Fuel prices can be negotiated as a markup on the spot market price. The spot market price is usually the lowest available price.

Ysleta ISD bids its fuel supply based on the spot market price as quoted by the Oil Price Information Service (OPIS), and receives a favorable fuel price of one-half cent above the OPIS price for unleaded gasoline and five cents above the OPIS price for diesel. Other districts, such as Tyler ISD, have been able to negotiate prices below the OPIS levels. Based on the experience of these other districts, cooperative purchasing should allow SISD to reduce its cost for unleaded gasoline to two-fifths of a cent above the OPIS price and diesel to four cents above the OPIS price.

San Antonio ISD participates in a buying cooperative with seven other school districts and several government agencies. In 1991, the district was estimated to save \$23,000 annually through cooperative purchasing. Other districts reporting similar cooperative purchases include San Angelo and Midland ISDs.

Spring ISD has created a buying cooperative with eight other school districts to purchase tires. The cooperative has no overhead expenses and arranges for the purchasing and disposal of tires. The total savings for all participating districts is \$60,000 a year.

Recommendation 105:

Cooperatively purchase fuel and tires.

The district should change its fuel-buying practices to bid the cost relative to the weekly OPIS prices and coordinate its purchase and disposal of tires with Region XIX, Sun Metro, and surrounding districts.

Ideally, a buying cooperative should be set up with other transportation providers in the region to negotiate lower prices on products and services and avoid the need to pay state sales taxes that individual districts pay when small purchases do not justify the paperwork involved to avoid the tax.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The superintendent contacts superintendents of neighboring school districts, Region XIX, and Sun Metro and arranges a meeting to discuss purchasing cooperatives.	April 1998
2	The coordinator of Transportation meets with the director of Purchasing to revise fuel and tire purchasing procedures.	April 1998

3	If feasible, a purchasing cooperative is established and begins purchasing items for the district.	August 1998
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FISCAL IMPACT

Estimated annual savings from bidding fuel costs relative to the weekly OPIS prices would be \$27,430 for unleaded gasoline and \$7,943 for diesel, for total annual fuel savings of approximately \$35,400.

Based on the savings at Spring ISD and taking into account SISD's smaller fleet size, the district should realize savings of about \$4,400 annually in the purchase and disposal of tires alone.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Cooperatively purchase fuel and tires	\$39,800	\$39,800	\$39,800	\$39,800	\$39,800

FINDING

Many public transit systems and private fleet managers conduct performance measurement. The critical role played by such monitoring cannot be underestimated. As noted by the Maintenance director at the Milwaukee County Transit System, "what gets measured gets done." Fleet managers report using performance measures to determine what training for employees is required; determine promotions and incentive rewards; enhance preventive maintenance programs to reduce repeat failures, road calls, and unscheduled maintenance; improve employee and customer satisfaction; and reduce costs.

While *TCRP Synthesis 22* did not attempt to document actual savings resulting from employee performance monitoring, some agencies used performance measures to target cost reductions. United Parcel Service set a specific company goal to reduce its maintenance costs by 10 percent and most agencies target reductions at a similar level. When the Houston Metropolitan Transit Authority instituted performance measures, its cost per mile fell by 36 percent, from \$5.26 to \$3.39, over a two-year period.

TSPR recommended a series of performance indicators to Houston ISD as part of its review of that district. These indicators were selected based on the district's specific needs. As a result of this recommendation, Houston's Transportation Department adopted the indicators shown in **Exhibit**. The target levels will be revised by HISD based on current information; for comparative purposes, the original recommended targets are shown as

well. These indicators now are tracked on a regular basis and district officials say the indicators have created healthy competition among mechanics. HISD cannot identify specific savings due to the newness of its program.

Exhibit 11-13
Recommended HISD Performance Measures

Performance Indicator	HISD 1994-1995 Actual	TSPR Recommended Target
Safety Accidents per 100,000 miles Incidents per 100,000 miles	1.5 2.9	1.4 2.6
Cost-Efficiency Operation cost per mile Annual operation costs per route	\$2.12 \$29,350	\$1.91 \$26,500
Cost-Effectiveness Annual costs per rider Percent state reimbursement (TEA)	\$699 47%	\$602 60%
Service-Effectiveness Riders per mile Riders per route	0.6 40	0.7 48
Service Quality On-time performance Open routes due to unfilled positions Driver absentee rate Average rider trip time in minutes	Not available 5% Not available Not available	95% 0% 5% 45
Maintenance Performance Miles between road calls Percent PM's completed on time Turnover time per bus in repair	Not available Not available Not available	9,500 95% 6 hours

Source: Extrapolated from HISD-provided data; transportation for summer program not included; recovered costs include state

reimbursement; targets have been set based on peer districts and estimated achievable rates.

SISD does not formally monitor many aspects of its transportation services, but TSPR was able to develop some indicators from the information provided. For example, from January to September 1997, the district reported eight accidents involving regular education buses and two involving special education buses. This level equates to an annual rate of 1.1 accidents per 100,000 miles for regular education buses and 0.6 accidents per 100,000 miles for special education buses. TSPR developed an operation cost per mile from annual data reported to TEA. Capital costs have been excluded since they are not variable costs. In 1995-96, SISD's operational cost per mile was \$1.81 for regular education and \$2.35 for special education. Using TEA data, the operation cost per rider was \$1.40 for regular riders and \$9.84 for special education riders.

Absentee and vacancy rates have been discussed in a previous finding. For 1996-97, these rates were 7.6 percent for absenteeism and 5.1 percent for vacancies. No data were available from the district to calculate on-time performance, missed trips, miles between road calls, or preventive maintenance checks performed on time.

The categories of performance indicators were selected to monitor the most important aspects of transportation. Safety is, of course, the most important aspect of transporting students. Measures of cost-efficiency, cost-effectiveness, and service effectiveness monitor how well the district provides the required service and whether it provides service in a way that controls costs. Service quality measures check the riders' perspective of service received. Students must arrive at school on time, and HISD has included indicators in this category that relate to management performance, such as the absentee rate. The final category monitors how well maintenance personnel perform their duties.

These indicators are interrelated and have some degree of overlap. A high percentage of preventive maintenance checks done on time will reduce the level of accidents due to mechanical failure. A high level of driver absenteeism will affect on-time performance if one driver must operate two routes to cover for an absent driver. The indicators permit the district to pinpoint troubled areas and document improvements.

Recommendation 106:

Develop key indicators to measure and monitor the performance of regular and special education transportation.

Exhibit 11-14 proposes performance measures for SISD's Transportation Department. These indicators were selected to measure the aspects of service that are most important and to track specific areas that have been identified in TSPR's findings as areas of concern. Targets have been selected based on levels that should be achievable in light of available information and the experience of other school districts and fleet operators.

Exhibit 11-14
Recommended SISD Performance Indicators

Performance Indicator	SISD 1995-96 Actual	Target
Safety		
Accidents per 100,000 miles - Regular	1.1*	1.0
Accidents per 100,000 miles - Special	0.6*	0.5
Cost-Efficiency		
Operation cost per mile - Regular	\$1.81	\$1.76
Operation cost per mile - Special	\$2.35	\$2.28
Cost-Effectiveness		
Operation cost per rider - Regular	\$1.40	\$1.36
Operation cost per rider - Special	\$9.84	\$9.55
Service Effectiveness		
TEA linear density - Regular	2.40	2.40
TEA linear density - Special	0.24	0.24
Service Quality		
On-time performance	Not available	95%
Missed trips	Not available	0%
Management Practices		
Driver absenteeism	7.6%*	5%
Driver vacancies	5.1%*	2%
Maintenance Performance		
Miles between road calls	Not available	9,500
Percent PM's completed on time	Not available	95%

* 1996-97 data.

Source: Actual figures from SISD Transportation Department.

The performance indicators that are most important to the board should be included in the performance reports recommended in the District

Organization and Management chapter. These reports should help to focus district management's attention on the critical function of transportation and reverse some of its apparent past neglect.

The targets for the safety indicators have been set at a 10 percent improvement. Although the district's current performance is high, a 10 percent improvement is achievable with the purchase of new vehicles, better tracking of preventive maintenance, and the recommended driver training.

The cost-efficiency and cost-effectiveness targets have been set at a modest 3 percent improvement. Previously identified savings account for a portion of these savings. Other reductions in costs would be achieved by the lower operating costs of new buses; better tracking of maintenance expenses through the VMIS system; fewer additional costs due to field trip overlaps, including a reduction in overtime expenses; and lower accident costs.

Service quality and maintenance performance targets have been set at levels typically achieved by fleet managers, or the levels required to deliver students to school in a timely fashion. With the more appropriately sized substitute driver force recommended by TSPR, the team leaders and lead drivers would be able to monitor on-time performance and missed trips. The VMIS system would permit roadcalls and PM inspections to be tracked.

The management practices targets are based on levels discussed in previous findings. By changing recruitment practices and instituting rewards for attendance, these targets should be achievable.

All personnel in the Transportation Department must be informed of these standards and measures of

performance, the targets to be achieved, and progress toward the targets. A performance-based management program can demonstrate the success of the Transportation Department in concrete terms.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The coordinator of Transportation and team leaders adopt key indicators to assess the performance of the department and the indicators and targets are publicized to the transportation staff.	April 1998
2	The coordinator of Transportation and team leaders monitor the performance indicators and disseminate the results to all transportation personnel.	Monthly

3	The coordinator of Transportation adjusts performance targets to reflect experience.	September 1998
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FISCAL IMPACT

Reducing operating costs include savings from lowered maintenance and personnel costs and reduced overhead expenses. The specific savings from individual sources generally cannot be quantified due to a lack of data. One potential source that *can* be estimated is a reduction in the overlaps of field trips with daily route service. If all overlaps were eliminated, seven fewer drivers would be required, resulting in approximately \$70,000 in annual savings.

Based on the experience of other fleet managers, a modest 3 percent improvement in the operating cost per mile is very achievable. If SISD achieves this target, higher savings are likely.

Recommendation	1998-99	1999-2000	2000-01	2001-02	2002-03
Develop key indicators.	\$70,000	\$70,000	\$70,000	\$70,000	\$70,000

FINDING

The Transportation Department supplies services to other departments throughout the district, in addition to transporting students to and from school. For transportation to extracurricular activities, particularly overnight field trips, the department competes with private transportation providers; school principals can contract with a private company or the Transportation Department for such trips. Transportation also maintains all district support vehicles, including the fleets used by the Security, Grounds, and Electrical Systems Departments.

As a provider of services to other departments, Transportation has limited control of its budget. Its expenses relate to the number of field trips requested by principals and the maintenance required on other department vehicles. The department does have some measures to recover costs, but these charges do not reflect the department's actual cost of providing the service. Since principals are charged for field trips, but are not charged the full amount, other departments are charged for the cost of parts to repair vehicles, but not for the labor.

One method to control costs is to establish the Transportation Department as an "internal service fund." In effect, the Transportation Department would become a separate business operated by the school district. As such,

it would "sell" its services to other departments, which would be free to purchase them or to contract with an outside provider.

Internal service funds are designed to capture all of the costs of providing activities that have a counterpart in the private sector. Examples of such activities undertaken by school districts are transportation, printing, construction, and maintenance. An internal service fund allocates all of the costs for these activities that are scattered among other departments, such as insurance and utility costs. By allocating these costs to the activities, their real total cost can be determined and ways to improve the operation can be identified.

The Jefferson County School District in Colorado and the Ingram and Abilene school districts in Texas have used the internal service fund approach. North East ISD in San Antonio has four internal service funds in operation while Wichita Falls ISD has two. Houston ISD is establishing all of its support services as internal service funds as part of a pilot project with the Comptroller of Public Accounts, TEA, and the Texas Association of School Business Officials. A final report on this pilot project is scheduled for November 1998.

An internal service fund would improve the department's accountability. If other departments are dissatisfied with the services they receive, they could go outside the district to find better services or prices. The Transportation Department would benefit from the additional funds it would receive, which could be used to improve its facilities and make capital purchases.

Recommendation 107:

Establish the Transportation Department as a separate internal service fund within the district.

As an internal service fund, the Transportation Department would sell its transportation and maintenance services to principals and other departments in the district. The budgets of the schools and other departments would be adjusted to fund the purchase of these services. The adjustment would be based on an evaluation of the actual costs of field trips, for example.

The Transportation Department should continue to supply transportation free of charge of regular education and special education students to and from school, to vocational locations, and on activity routes. Charges should be made for extracurricular field trips and for other departments' vehicle maintenance to reflect the actual cost of these services.

To establish an internal service fund, the cost of the activity must be determined and a price for the activity set. For example, the cost of providing field trips must be calculated to determine a price for the service. The district then would allocate money to the departments and schools that will purchase field trips from the internal service fund, rather than allocating these funds to the service department. As noted in an examination of internal service funds conducted by the Comptroller's office, "The money is provided to the user so that better decisions can be made about what, and how much of the given service is really needed. The service department must pay close attention to user needs to expand or eliminate service elements, while improving in efficiency areas and eliminating waste." The establishment of an internal service fund would reinforce TSPR's other recommendations in the chapter.

The Transportation Department would keep the revenue from these charges to offset its costs. The department also would keep the revenue from the sale of advertising to reinvest in improved equipment and facilities. The department would be free to sell its services to other school districts or public agencies.

The internal service fund should be implemented following the guidelines that are under development by the Comptroller's office. Until these guidelines are completed, the department should track its costs in detail to provide the information required to price the services. This tracking would be reinforced by the performance measures.

IMPLEMENTATION STRATEGY AND TIMELINE

1	The coordinator of Transportation adopts performance measures and regularly tracks performance.	May 1998 Ongoing
2	The Comptroller of Public Accounts releases internal service funds guidelines.	November 1998
3	The assistant superintendent for Administration and the superintendent for SISD propose to the board that the Transportation Department be converted to an internal service fund.	December 1998
4	The Finance director establishes accounting mechanisms to charge for the cost of transportation services.	January 1999
5	The district adjusts individual department budgets to fund transportation services.	January 1999
6	The Transportation Department implements new changes and fully tracks the cost of its services.	January 1999

FISCAL IMPACT

Implementation of an internal service fund could be accomplished within existing resources.

By tracking expenses in enough detail to develop charges to other departments and respond to competition from the private sector, the department should be able to reduce its cost per mile of service.

Chapter 12

SAFETY AND SECURITY

This chapter reviews SISD's safety and security policies and procedures in three sections.

- A. Organization and Management
- B. Discipline Management
- C. Security Service

School district safety and security functions are charged with maintaining a safe and secure school and working environment; identifying students with special behavioral problems and channeling them into programs that allow them to succeed; and enforcing local, state, and federal laws.

SISD has maintained a high attendance rate among its students and developed numerous prevention and intervention programs to address the needs of students with special behavioral problems. As its number of students and facilities continues to grow, however, the district is likely to encounter more criminal activity and increasing discipline problems. To ensure the continued safety of its staff and students, SISD will need to develop a long-range plan for its safety and security functions and coordinate these functions with other school districts and local agencies.

BACKGROUND

Federal and state laws address safety and security in public schools. In 1994, the U.S. Congress reauthorized the Safe and Drug-Free Schools and Communities Act, which requires school districts to institute a comprehensive safe and drug-free schools program. In 1997, Congress reauthorized the Individuals with Disabilities Education Act (IDEA) with some significant changes. Though the new law, like its predecessor, requires school districts to provide appropriate educational services for students with disabilities, the revisions to IDEA also make it easier to remove dangerous or violent students with special needs from the classroom. The legislation also permits the removal of students who are involved with drugs or who bring weapons to school.

The Texas Legislature also has addressed school violence. **Exhibit 12-1** summarizes major legislation relating to school safety and security passed by the Texas Legislature in 1993, 1995, and 1997.

Exhibit 12-1

Major School Safety Initiatives of the Texas Legislative Session

1993 - 1997

Legislation	Purpose
1993 Legislature	
House Bill 23	Requires information-sharing between law enforcement and schools on student arrests for serious offenses; requires school principals to notify law enforcement if criminal activity occurs or is suspected of occurring on campus.
Senate Resolution 879	Encourages collaboration between the Texas Education Agency and Department of Public Safety in the recording of criminal incidents in the schools.
House Bills 633 and 634	Outlines the commissioning and jurisdiction of peace officers for school districts.
House Bill 2332	Authorizes the State Board of Education to establish special-purpose schools or districts for students whose needs are not met through regular schools.
Senate Bill 16	Defines drug-free zones for schools.
Senate Bill 213	Creates the safe schools checklist.
Senate Bill 155	Creates the Texas Commission on Children and Youth.
1995 Legislature	
Senate Bill 1	Overhauls the Education Code and laws on safety and security in Texas schools.
1997 Legislature	
Senate Bill 133	Rewrites the safe schools provision of the Education Code.

Source: Policy Research-April 1994, Texas Education Agency; and Neal & Gibson

The 1995, the 74th Legislature passed sweeping changes in laws concerning school safety and security. Under the revised education code,

each school district must adopt a student code of conduct with the advice of a district-level committee and the county juvenile board. Other provisions require districts to remove students who engage in serious misconduct and place them in alternative education programs. In addition, specific information concerning the arrest or criminal conduct of students must be shared between law enforcement entities and local school districts.

1995 legislation also requires a working relationship among school districts, the juvenile board, and juvenile justice systems in counties with a population of 125,000 or more. This legislation also established the Juvenile Justice Alternative Education Program (JJAEP) under the jurisdiction of the Texas Juvenile Probation Commission. One of the objectives of JJAEP is to provide for the education of incarcerated youth and youth on probation, populations believed to be more susceptible to committing crimes.

In 1997, the Legislature revised the safe school provisions of the Education Code. These revisions require the prominent posting of the student code of conduct, clarify removal procedures for offenses committed by students within 300 feet of school property, and apply compulsory attendance laws to JJAEP.

SISD's boundaries coincide with the jurisdiction of four local governments, including the County of El Paso, City of El Paso, City of Socorro, and City of Horizon Heights. SISD is located on the eastern limits of El Paso, Texas' fourth-largest metropolitan area. El Paso has a population of 543,800. The undocumented population in El Paso County is estimated at about 250,000. SISD is the third-largest school district in the El Paso metropolitan area after El Paso and Ysleta ISD's.

To gauge the area's overall safety and security, the review team examined the number of index crimes in the El Paso metropolitan area over a five-year period, as reported by the four local government jurisdictions covered wholly or partly by SISD. An index crime is one of the crimes used to measure the overall criminal activity of an area. Criminal activity in the metropolitan area declined from 51,121 incidents in 1992 to 42,803 in 1994, but subsequently increased to 47,671 in 1996 (**Exhibit 12-2**).

Exhibit 12-2

Index Crimes Reported by Selected Law Enforcement Agencies

1992-96

Agency	1992	1993	1994	1995	1996
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El Paso County Sheriff's Dept.	2,603	2,597	2,148	2,053	1,897
Horizon City Police Department	73	62	67	63	105
Socorro Police Department	NA	NA	123	439	535
Subtotal	2,676	2,659	2,338	2,555	2,537
El Paso Police Department	48,445	46,738	40,465	41,692	45,134
Total	51,121	49,397	42,803	44,247	47,671

Source: State Crime Report, Texas Department of Public Safety
Criminal activity measured by the four local governments' police departments reflect the same overall trend.

A list of types of violations described in the Socorro Student Code of Conduct and the Texas Penal Code are shown in **Exhibit 12-3**

Exhibit 12-3

Types of Violations in the Student Code of Conduct and Texas Penal Code

1997-98

Violation	Description
Discipline-related incident	Disciplinary infraction of the district's behavior standards
Criminal-related incident	Unlawful activity or intent under the Texas Penal Code
Repeated misbehavior	Persistent minor violations of the district's behavior standards

SISD's increasing enrollment has been accompanied by an increasing number of criminal and discipline-related incidents (**Exhibit 12-4**). Moreover, the growth in incidents has outpaced the rise in enrollment, although this may be due in part to improved reporting of incidents.

Exhibit 12-4

Criminal Activity and Discipline-Related Incidents - SISD

1992-93 through 1996-97

	1992-93	1993-94	1994-95	1995-96	1996-97
Criminal activity	NA	NA	284	373	401
Discipline-related incidents	335	268	230	519	581
Enrollment	16,757	17,608	18,822	20,141	20,500

Source: Department of Security Services and Department of Student Services, SISD; and PEIMS

SISD's enrollment is expected to continue to increase, with a projected student body of 27,252 by the 2000-01 school year. With this growth, SISD can expect the number of criminal and behavior-related incidents to rise as well, despite declines in the area crime rate.

Chapter 12

ORGANIZATION AND MANAGEMENT

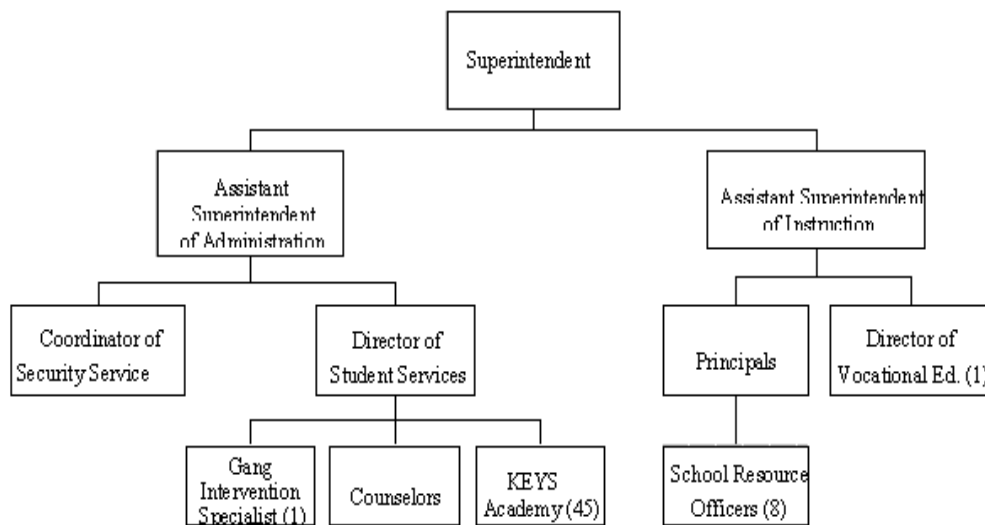
CURRENT SITUATION

The Department of Student Services and the Department of Security Services are the two principal departments responsible for ensuring the safety and security of students and staff at SISD (Exhibit 12-5).

Exhibit 12-5

Organization

Safety and Security Functions



Source: Department of Administration and Department of Instruction, SISD

The Department of Student Services is responsible for the code of student conduct, prevention and intervention programs, counseling, and alternative education. The Department of Security Services provides attendance officers, school officers, patrol officers, and internal investigation services.

KEYS Academy, the district's alternative education school, was established in the 1994-95 school year to provide specialized attention to students with severe behavioral problems; it has an average daily attendance of almost 90 students. Before KEYS Academy, the district operated the Socorro Alternative School on the campus of Socorro High

School. (Alternative education is discussed in the Educational Service Delivery and Performance Measures chapter of this report.)

Security Services has increased its number of security officers on campuses over the last three years. The number of officers placed at KEYS Academy has risen from one officer in 1994-95 to three in 1996-97. In 1996-97, the district also allocated officers part-time to all four middle schools. Both the director of Student Services and coordinator of Security Services report to the assistant superintendent of Administration.

Principals and assistant principals are responsible for discipline at each school. School resource officers from local police departments at three high schools and most of the middle schools provide anti-violence and anti-drug seminars to students and staff. The director of Vocational Education coordinates the district's teen pregnancy program. School principals and the director of Vocation Education report to the assistant superintendent of Instruction.

FINDING

SISD does not have a long-range plan for safety and security functions that coordinates the district's prevention, intervention, and enforcement activities.

The district does not track performance measures or issue reports on the effectiveness and efficiency of the district's safety and security activities. Student Services and Security Services have a combined 1997-98 budget of \$1.4 million. Without performance measures or reports, it is difficult to determine if funds are allocated in the most effective way.

Given the number of departments and individuals involved in coordinating the district's security activities it is important for everyone involved to know what the district expects to accomplish and how they plan to get there.

For example, only 12 of SISD's 43 security personnel are certified as peace officers through the Texas Commission on Law Enforcement Officers Standards and Education. Although the Texas Education Code allows SISD's Department of Security Services to become a formal police department, the board has not approved its institution. In its existing structure Security Services is not required to comply with the state's mandatory training requirements for certified peace officers. Its officers are trained primarily on security rather than law enforcement functions. And because it is not certified, it cannot readily receive criminal incident information from other law enforcement agencies.

Some school administrators frequently request law enforcement services from its School Resource Officers (SROs) rather than from the security force. KEYS Academy has the severest behavioral problem but none of the three security officers assigned to the academy are certified peace officers. In order to issue citations or arrest students, SISD must call upon the services of the Socorro Police Department.

The roles and responsibilities of certified peace officers, SROs, and security personnel must be clearly differentiated so that all district personnel know who is responsible for what security and/or enforcement function and where these roles fit in the overall plan for safety and security in the district.

Recommendation 108:

Develop a long -range plan and performance measures for the district's safety and security functions.

Given the necessity for a balanced approach between prevention and enforcement, the director of Student Services and coordinator of Security Services should cooperate in implementing a long-range plan for safety and security, including goals and performance targets.

Performance tracking reports should be developed for each participating department or group involved in district safety and security, including Student Services, Security Services, school administrators, teachers, and students. This report should compare key performance measures for each group over the last five years. Examples of these performance measures are illustrated in **Exhibit 12-6**.

Exhibit 12-6

Sample Performance Measures

For Safety and Security Functions

Student Services
• Discipline-related incidents per student.
• Expenditures for the removal of graffiti on school property per facility.
• Drug-related incidents per student.
• Students referred to guidance programs as a percentage of student enrollment.
• Percent of students returning to alternative education centers or schools after successfully completing the program.

<ul style="list-style-type: none"> • Perceptions of school safety and violence of central administrators, school administrators, teachers, and students.
Security Services
<ul style="list-style-type: none"> • Number of security officers per student by school.
<ul style="list-style-type: none"> • Level of cooperation between Security Services and other law enforcement agencies.
<ul style="list-style-type: none"> • Truancy rates of students.
<ul style="list-style-type: none"> • Attendance rates of students (already tracked by the district).
<ul style="list-style-type: none"> • Dropout rates of students (already tracked by the district).
<ul style="list-style-type: none"> • Percent of security personnel with specialized training or certifications.
School Administrators
<ul style="list-style-type: none"> • Discipline-related incidents per student by school (already being tracked by the district).
<ul style="list-style-type: none"> • Drug-related incidents per student by school (already being tracked by the district).
<ul style="list-style-type: none"> • Repeated behavior incidents per student by school.
Teachers
<ul style="list-style-type: none"> • Percent of teachers trained on student behavioral problems.
<ul style="list-style-type: none"> • Percent of teachers trained in gang awareness.
<ul style="list-style-type: none"> • Percent of teachers trained in drug awareness and prevention.
Students
<ul style="list-style-type: none"> • Percent of students trained in gang awareness by grade.
<ul style="list-style-type: none"> • Percent of students trained in drug awareness and prevention by grade.
<ul style="list-style-type: none"> • Percent of students committing repeated misbehavior incidents by grade.
<ul style="list-style-type: none"> • Percent of at-risk students participating in initiatives for improving student achievement by grade.

Source: Neal & Gibson

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The board and superintendent discuss and create their vision for safety and security in SISD.	
2	The superintendent directs the assistant superintendent of Administration, the director of Student Services, coordinator of Security Services, assistant superintendent of Instruction, and assistant superintendent for Strategic Planning to develop a long-range plan for safety and security with input from school administrators and security personnel.	April 1998 - July 1998
3	The assistant superintendent for Administration and Instruction work with their staff to establish clear definitions of the roles and responsibilities for security personnel.	
4	The director of Student Services and coordinator of Security Services submit drafts of a long-range plan and performance measures for district safety and security functions to the superintendent, assistant superintendent of Administration, and school administrators.	July 1998
5	The assistant superintendent of Administration requests any revisions or additions from district staff, as appropriate, and submits the proposed plan and performance measures to the assistant superintendents for Instruction and Strategic Planning and the superintendent for approval.	August 1998
6	After any necessary revisions, the superintendent submits the plan and performance measures to the board for approval.	October 1998
7	The board approves the long-range plan and performance measures for the district's safety and security functions.	November 1998

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

Information sharing among local governmental agencies, including police departments, juvenile probation departments, protective services, and school districts, is essential for providing a coordinated response to serious juvenile offenders, determining the effectiveness of prevention and intervention programs, and developing shared services among agencies to stretch limited funds. SISD participates in several programs offered through the El Paso County Juvenile Probation Department (**Exhibit 12-7**). These programs include Project Redirection, the teen parenting program; the Juvenile Justice Alternative Education Program (JJAEP) at Cesar Chavez Academy; and the NovaNet Computer Based Education

System, a computer-based learning tool offering almost 10,000 hours of self-paced instruction in more than 150 subject areas.

Exhibit 12-7

Selected Programs

El Paso County Juvenile Probation Department

Program	Objective	Target
First Offenders Program	Divert first offenders from court system	First time offenders
Juvenile Court Conference Committee	Early prevention program	Juveniles, ages 10-16
Domestic Violence Prevention and Education	Preventing family violence	Juveniles, ages 10-16
Family Support Group	Preventing family violence	Juveniles, ages 10-17
Parent to Parent Group	Parenting skills	Parents of juveniles
<i>Project Re-direction</i>	<i>Counseling and education on parenting skills</i>	<i>Teen parents, ages 10-16</i>
Cognitive Development Program	Reasoning and coping skills	Juveniles, ages 14-18
Independent Living Skills Program	Relationship skills	Males and females, ages 15-18
Male Responsibility	Educate male youth on responsibilities of manhood	Males, ages 10-16.
Back on Track Mentor Program	Mentoring program	First time juvenile offenders, ages 10-16
A New Way of Life	Career development. education.	Female

	self-esteem	offenders, ages 13-17
<i>NovaNet Computer Based Education System</i>	<i>Accelerate student achievement</i>	<i>Juveniles, ages 10-17</i>
Drug and Substance Abuse Prevention and Education	Drug and substance abuse counseling	Juveniles
Alcohol Abuse Prevention and Education	Awareness of consequences of alcohol abuse	Juveniles, ages 10-16
Serious Habitual Offender Comprehensive Action Program	To increase cooperation and coordination among government agencies	Adjudicated youths who have committed serious offenses
<i>Juvenile Justice Alternative Education</i>	<i>Educate expelled juveniles</i>	<i>Expelled juveniles</i>
Challenge	Rehabilitation of the most serious juveniles	Adjudicated males, ages 14-16

Note: Text in italics indicates programs in which SISD participates.

Source: Delinquency Prevention in Texas, Texas Juvenile Probation Commission

As shown in **Exhibit 12-7**, SISD has not taken full advantage of other programs offered through the Juvenile Probation Department.

Ysleta ISD's Cesar Chavez Academy offers an exemplary alternative education program. The program met or exceeded all curriculum requirements outlined in the Education Code for JJAEPS, including GED. Approximately seven discretionary placements are allocated to SISD. A comparison of one of its programs to SISD's KEYS Academy is shown in **Exhibit 12-8**.

Exhibit 12-8

KEYS Academy versus YISD's Cesar Chavez Academy

Criteria	SISD's KEYS Academy	YISD's Cesar Chavez Academy
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Facility	Shares a facility with other district departments without substantial security measures, such as fencing or security entrances/exits, for almost 90 students.	Is a self-contained facility dedicated exclusively for the use of school staff and about 250 students.
Discipline	Has relatively permissive disciplinary policies for behavior on school property and buses.	Maintains strict discipline policies similar to those at Texas Youth Commission facilities.
Enforcement	Stations three security guards at the facility but has no certified peace officer on school property	Stations a certified peace officer on school property.

Source: KEYS Academy and Cesar Chavez Academy

Recommendation 109:

Coordinate the district's safety and security functions fully with other school districts and local agencies.

The district should develop an annual safety and security conference with local school districts and law enforcement agencies to share information about safety and security activities.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent of Administration, assisted by the director of Student Services and coordinator of Security Services, identifies ways to more fully coordinate safety and security functions with other school districts and local law enforcement agencies.	June 1998
2	The coordinator of Security Services provides criminal activity statistics and reports on a quarterly basis to the El Paso Police Department, El Paso County Sheriff's Department, Socorro Police Department, and Horizon Police Department.	August 1998 and Ongoing
3	The director of Student Services identifies other successful prevention and intervention programs in the area and incorporates these concepts into the district's own programs.	August 1998 and Ongoing
4	The assistant superintendent of Administration, with the assistance of the director of Student Services and coordinator of Security Services, develops an annual safety and security	August 1998

conference with local school districts and law enforcement and other agencies.	
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FISCAL IMPACT

Active participation in other prevention and intervention programs can be accomplished with existing resources.

The annual safety and security conference would require the rental of a conference room at a local hotel, which should cost an average of \$100 for one-half day. The cost for lunch per person is estimated at \$15 per person. Attendance is estimated at 15 participants, including one representative from three school districts, four law enforcement agencies, and the juvenile probation department, and several representatives from local social and family service organizations. By charging each participant \$22 for the conference, the district could conduct the conference at no additional cost.

Chapter 12

DISCIPLINE MANAGEMENT

CURRENT SITUATION

Discipline management includes student discipline policies, procedures, and programs developed and managed by the school district. These policies and procedures include the student code of conduct and delinquency prevention and intervention programs.

Every Texas school district is required to adopt a code of conduct. The code must establish standards for student behavior and comply with provisions outlined in the Texas Education Code. SISD's code is maintained in a manual entitled *Student Code of Conduct, 1997-98*. SISD has numerous prevention and intervention programs designed to provide life skills training and to prevent student delinquency, dropouts, and drug abuse. The district's major programs focus on mediation skills, delinquency, and teen pregnancy (**Exhibit 12-9**).

Exhibit 12-9

Selected Prevention and Intervention Programs

1996-97 School Year

Program	Focus	Description
Prevention Programs		
Quest - Skills for Living	Life Skills	Helps students acquire self-discipline, responsibility, good judgment, and the ability to get along with others.
Quest - Skills for Adolescence	Life Skills	Addresses the primary causes of many of the problems of adolescence: low self-esteem, difficulty in coping with negative peer pressure, poor family communication, irresponsibility, a lack of goals, and poor decision-making skills.
Peer Pressure Reversal	Delinquency	Provides students with the skills needed to avoid juvenile crime, drug use, dropout, teen pregnancy, and suicide.
Project REAL	Delinquency	Addresses students' social and academic needs through services such as tutoring, parenting classes, drug abuse prevention

		techniques, student service programs, and family coping skills.
Communities in School	Dropout	Provides an in-school dropout prevention and recovery program at selected schools.
Mother/Daughter Program and Father/Son Program	Dropout	Targets students from low socioeconomic backgrounds who have not had a family member graduate from college and encourages them to stay in school.
McGruff's	Drug	Provides a curriculum designed to teach children practical, confidence-building lessons in a positive way.
Just Say No	Drug	Presents a balanced, research-based approach to drug abuse prevention.
Intervention Programs		
Peer Assistance and Leadership for Students (PALS)	Peer Mediation	Trains selected high school and middle school students to work as mediation leaders.
IMASTAR	Delinquency	Provides a comprehensive model of intervention for predominately Mexican-American rural youth attending KEYS Academy and other middle and high schools.
Program Re-direction	Teen pregnancy	Furnishes a YWCA-sponsored case worker to locate teenage parents and provide support in the form of day care, transportation, and social services.

Source: Department of Student Services, SISD

SISD also has many programs for parents, including Parenting for Prevention, Parents against Dropouts, Parents as Partners, Parent to Parent, and Partners in Education. SISD also works with local law enforcement agencies to offer drug and gang prevention programs as Drug Awareness Resistance Education (D.A.R.E.) and Gang Resistance Education and Training (G.R.E.A.T.).

FINDING

SISD's 1997-98 Student Code of Conduct details the specific categories of disciplinary offenses, the disciplinary consequences or options for district and school administrators, and disciplinary procedures for these offenses.

The district classifies offenses according to four categories: Level 1: Offenses Where Administrative Action is Discretionary; Level 2: Offenses Requiring Limited Administrative Action; Level 3: Offenses Requiring Serious Administrative Action; and Level 4: Offenses Requiring Major Administrative Action.

SISD's schools appear to apply district discipline management and alternative education referral policies inconsistently. Specifically, Socorro High School refers a larger share of its students to the district's alternative education programs than do Montwood or Americas High Schools (**Exhibit 12-10**).

Exhibit 12-10

Referrals and Expulsions-to-Enrollee Ratio by School

1996-97

		Referrals to Alternative Education Programs		Expulsions	
School					
Enrollment	Number	Referrals-to-Enrollee Ratio	Number	Expulsions-to-Enrollee Ratio	
High Schools					
Montwood	2,723	60	1:45	1	1:2,723
Socorro High	2,224	82	1:27	2	1:1,112
Americas *	1,075	20	1:54	0	--
KEYS Academy	82	4	1:21	22	1:4
Subtotal / Average	6,104	166	1:37	25	1:244
Middle Schools					
Salvador H. Sanchez	965	28	1:35	0	--
Socorro Middle	924	20	1:46	0	--
Walter F.	977	22	1:44	3	1:326

Clark					
William D. Slider	1,327	17	1:78	0	--
Subtotal / Average	4,193	87	1:48	3	1:1,398
Total / Average	10,297	253	1:41	28	1:368

*Note: * Grades 7 to 10.*

Source: Department of Student Services, SISD

Furthermore, some students are not referred to alternative education despite severe disciplinary problems including possession of drugs, repeated misbehavior, and theft. According to the Student Code of Conduct and the Texas Education Code (Section 37.0006), the district has the option to place a student, who commits a Level 3 offense, in an alternative education program (KEYS Academy). Offenses requiring serious administrative action include assault, possessing or use of drugs and repeated or combined Level 1, 2, or 3 offenses. The regulations governing referrals to an alternative education school and expulsion are based on Subchapter A of the Texas Education Code. Administrative discipline options for Level 4: Offenses "Requiring Major" Administrative Action include expulsion and notification of police. Offenses requiring major administrative action include use or possession of a firearm, aggravated assault, and criminal mischief.

SISD's inconsistent application of discipline management practices appears to be due in part to site-based decision-making, which gives principals considerable flexibility in deciding how to implement these practices. In addition, school administrators may be reluctant to refer students to the KEYS Academy due to an outstanding lawsuit over one such student.

Recommendation 110:

Comply with state law and district policies and procedures to ensure consistent application of discipline management practices.

Consistent application of discipline management practices would support more defensible placement decisions and ensure compliance with applicable state laws.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent of Administration and director of Student Services establishes an undisclosed schedule of discipline management reviews for all schools in the district.	September 1998
2	The director of Student Services performs the discipline management reviews and reports the results to the board and superintendent.	September 1998 and Ongoing
3	School administrators make any necessary adjustments in discipline management practices recommended by the reviews.	October 1998 and Ongoing

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

The School Resource Officer (SRO) program is an effort by local police departments "to work with the local school districts to curtail juvenile conduct as defined in the Texas Family Code according to the SRO job description provided by the El Paso Police Department." Three law enforcement agencies: El Paso Police Department, El Paso County Sheriff's Department, and Socorro Police Department, provide SROs to SISD schools who offer anti-violence and anti-drug seminars (**Exhibit 12-11**).

Exhibit 12-11

School Resource Officers

1997-98 School Year

School	El Paso Police Dept.	El Paso County Sheriff's Dept.	Socorro Police Dept.	Total
High Schools				
Montwood	0	0	0	1
Socorro High	0	2	0	2
Americas *	1	0	0	1
KEYS Academy	0	0	0	0
Subtotal	2	2	0	4
Middle Schools				

Montwood	0	0	0	1
Salvador H. Sanchez	0	0	1	1
Socorro Middle	0	0	1	1
Walter E. Clark	1	0	0	1
William D. Slider	1	0	0	0
Subtotal	2	0	2	4
Total	4	2	2	8

Source: Department of Security Services, SISD

The law enforcement agencies and SISD typically split the cost of the SROs' salaries and benefits; however, the terms of the agreements between the school district and these agencies vary. The El Paso Police Department pays half of the cost of the days its four officers work in the district.

The El Paso County Sheriff's Department, which contributes two SROs, pays the cost of the senior officer while the district pays the cost of the junior officer. The Socorro Police Department pays one-half of the annual salary of its officers because the SRO spends half time in the district and the other half in their respective law enforcement agency.

The review team found that SISD's understanding of SROs' roles and responsibilities is inconsistent with the SRO job description provided by the El Paso Police Department. (District personnel could not supply the review team with SRO job descriptions from the El Paso Sheriff's Department or Socorro Police Department.) Without a clear definition of purpose, SROs can't relate their role to administration and students, and the district reduces the effectiveness of the delinquency, dropout, and gang prevention services needed by students.

During the review team's on-site visit, officers from the Sheriff's Department indicated that their primary function was to prepare and provide prevention presentations on topics such as drug abuse, family violence, sexual assault, jail life, gang prevention, the Texas Education Code, and personal safety to students and staff. However, the only student interaction specified in the El Paso Police Department job description is "to be available before school (8:00-8:30 A.M.) after school (3:30-4:00 P.M.) and during lunch periods, so as to interact with the students in an informal atmosphere."

Understanding of the SRO roles and responsibilities also varies among school administrators. Some administrators ask SROs to act in an enforcement role rather than a preventative one; others view their purpose as preventative only.

This confusion is understandable. SROs, who are certified peace officers, are responsible for many prevention presentations to district personnel and students, while the district's security officers, who may or may not be certified peace officers, perform an enforcement role in the district.

Although the director of Student Services manages most prevention programs, the assistant superintendent for Instruction manages the SRO program. This division of responsibilities results in a lack of coordination between these activities and other prevention programs.

Recommendation 111:

Transfer management of the school resource officer program to the director of Student Services and clearly define the roles and responsibilities of school resource officers.

Under the director of Security Services, the roles and responsibilities of school resource officers should be clearly defined and the program fully integrated with other district anti-violence and anti-drug programs. The gang intervention specialist should work with SROs to closely monitor gang activities.

The assistant superintendent of Administration should continue to cultivate the mutually beneficial relationships with outside law enforcement agencies begun by the assistant superintendent of Instruction.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The superintendent transfers the SRO program to the director of Student Services.	April 1998
2	The director of Student Services fully integrates and coordinates the activities of the SROs with other anti-violence and anti-drug programs.	May 1998
3	The assistant superintendent of Administration develops job descriptions for all SROs.	June 1998
4	The assistant superintendent of Administration clarifies the roles and responsibilities of SROs to all appropriate school personnel.	July 1998
5	The assistant superintendent of Administration continues to develop	Ongoing

a mutually beneficial working relationship with outside law enforcement agencies.	
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FISCAL IMPACT

This recommendation can be accomplished with existing resources.

Chapter 12

SECURITY SERVICES

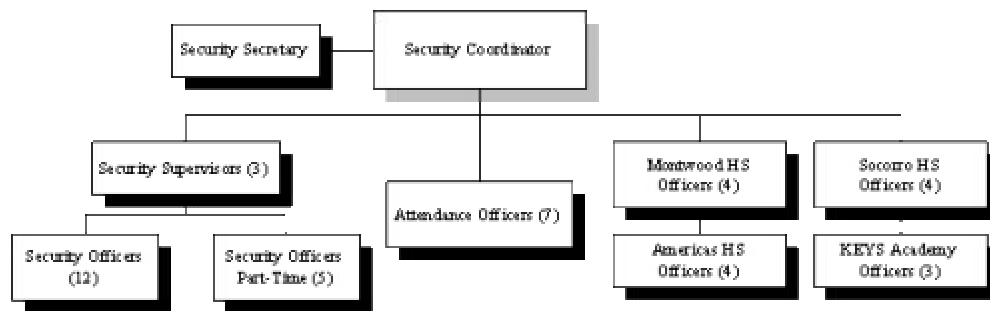
CURRENT SITUATION

The Department of Security Services is responsible for protecting the life and property of district students and personnel and maintaining a safe environment in SISD facilities. Security Services has a total of 43 employees managed by a coordinator (**Exhibit 12-12**).

Exhibit 12-12

Organization

Department of Security Services



Source: Department of Security Services, SISD

The coordinator of Security Services also is responsible for coordinating the district's activities with local law enforcement agencies.

The security secretary, who maintains statistical information and produces reports on criminal activity in the district, assists the coordinator of Security Services. Other positions include seven attendance officers, three security field supervisors, four security officers at each of the three high schools, and three security officers at KEYS Academy.

Security Services staffing has risen from 33 employees in the 1994-95 school year to 43 in 1996-97 (**Exhibit 12-13**).

Exhibit 12-13

Actual Expenditures

Security Services

1993-94 through 1996-97

Category	1993-94	1994-95	1995-96	1996-97
Salaries	\$519,291	\$622,054	\$628,789	\$622,449
Purchased services	17,944	11,772	10,335	5,546
Materials and supplies	8,662	31,410	22,743	49,676
Other operating expenses	1,994	2,321	5,039	5,304
Subtotal	547,891	667,557	666,906	722,975
Capital Outlay	15,242	11,950	34,755	32,400
Personnel				
Full-time employees	NA	33	38	43

Source: Finance, SISD

The department's operating budget has increased from \$547,891 in 1993-94 to \$722,975 in 1996-97 primarily due to increases in salary expenses as new employees are added to serve the increasing student population. Expenditures for purchased services have declined from \$17,944 to \$5,546, while expenditures for materials and supplies have increased from \$8,662 to \$49,676 over the same time period.

FINDING

SISD has been able to keep its overall attendance rate above 95 percent despite rapid enrollment growth. From 1993-94 to 1995-96, Security Services had six attendance officers. In 1996-97 Security Services increased the number of attendance officers from six to seven. Each attendance officer is assigned to several schools (**Exhibit 12-14**). Their duties include investigating student absences; making home visits to parents of truant students; and serving as a liaison between the schools and parents.

Exhibit 12-14

Attendance Rates

1993-94 through 1996-97

School	1993-94	1994-95	1995-96	1996-97
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Attendance Officer 1				
Robert Rojas	95.6%	95.9%	96.2%	96.0%
H. D. Hilley	96.2%	95.8%	95.6%	95.7%
Hueco	96.0%	96.0%	96.2%	96.5%
Salvador H. Sanchez	95.1%	95.0%	95.7%	95.5%
Attendance Officer 2				
Campestre	97.0%	96.7%	96.8%	96.6%
Escontrias ECC	94.8%	NA	NA	94.4%
Escontrias Elementary	96.9%	95.9%	95.8%	96.6%
Socorro Middle	96.0%	96.3%	96.3%	96.5%
Attendance Officer 3				
Socorro	94.7%	94.4%	94.1%	94.4%
KEYS Academy	NA	NA	82.0%	81.4%
Attendance Officer 4				
Myrtle Cooper	95.4%	95.0%	95.0%	95.5%
O'Shea Keleher	96.0%	96.2%	96.2%	96.1%
Vista Del Sol	95.1%	94.8%	95.1%	95.6%
Benito Martinez	96.2%	96.2%	96.5%	96.0%
Attendance Officer 5				
Horizon Heights	96.5%	96.5%	96.2%	96.1%
Helen Ball	NA	NA	95.4%	95.5%
Montwood Middle	NA	NA	NA	NA
Chavez	NA	NA	NA	NA
Attendance Officer 6				
William D. Slider	95.6%	96.2%	95.2%	95.9%
Montwood High	93.7%	93.5%	93.0%	93.0%
Attendance Officer 7				
Americas *	NA	NA	NA	95.3%
Walter E. Clark	95.8%	95.5%	94.6%	95.5%
Sierra Vista	95.7%	95.2%	96.1%	96.3%

Overall Attendance Rates	95.6%	95.6%	95.4%	95.1%
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NA indicates not available.

* Indicates school includes grades 6 to 9 in 1995-96 and grades 7 to 10 in 1996-97.

Source: PEIMS and Academic Excellence Indicator System, Texas Education Agency

For every student attending school, SISD receives an additional \$2,641 in state funding.

Laredo Independent School District (LISD) has the highest attendance rate of peer districts surveyed by the review team (**Exhibit 12-15**).

Exhibit 12-15

Attendance Rates

SISD versus Peer Districts

District	1994-95	1995-96	1996-97
Laredo	96.7%	96.3%	96.7%
Socorro	95.6%	95.4%	95.1%
United	95.4%	95.1%	95.4%
El Paso	95.0%	95.1%	95.0%
Ysleta	94.7%	94.9%	94.7%
San Juan-Pharr-Alamo	95.4%	95.1%	95.4%
Southwest	94.5%	94.4%	94.5%
Edinburg	95.4%	94.8%	95.4%
State average	95.1%	95.1%	NA

Source: Academic Excellence Indicator System, Texas Education Agency
 LISD's attendance rate has averaged 1.2 percent higher than SISD's for the past three years.

LISD generally allocates one attendance officer for each grade level at each school, although it lowers this ratio for its smaller schools. LISD has 22 attendance officers for its four middle schools and three high schools. The attendance officers at each school report to the assistant principal in charge of truancy. The district analyzes attendance rates by grade and by second-period class. LISD also closely links the performance of its attendance officers with school and district attendance rates and the associated state revenue generated from these students. LISD has found that poor attendance rates in a particular class appear to be closely related to poor classroom management skills and has developed training programs for its teachers to improve these skills.

Recommendation 112:

Link the number of attendance officers to attendance rates at district schools.

The district should analyze attendance and truancy rates at each school by grade and by attendance in second-period class, and increase the number of attendance officers at schools with the greatest potential for increases in attendance. The district should develop reports to monitor the performance of attendance officers to ensure the program's effectiveness.

Each school should analyze the relationship between low attendance rates in second-period classes with the classroom management skills of its school staff. The district should develop training programs to improve the classroom management skills of its teachers as necessary. For example, Region XIX offers the Boy's Town Specialty Classroom Management course that provides teachers with skills to manage and teach students with moderate to severe behavioral problems.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent of Administration, with the assistance of the coordinator of Security Services, analyzes the attendance and truancy rates of each school by grade and by second period class and identifies schools with the highest potential for increases in attendance.	June 1998
2	The assistant superintendent of Administration develops a plan to	July 1998

	increase the number of attendance officers at certain schools based on the attendance rate analysis.	
3	The superintendent approves, with any necessary changes, the plan for increasing the number of attendance officers.	August 1998
4	The coordinator of Security Services increases the number of attendance officers at those schools with the highest potential for increases in attendance.	September 1998
5	The principals at each school analyze the reasons for low attendance in second-period classes and improve classroom management skills for school staff as appropriate.	September 1998
6	The assistant superintendent of Administration, with the assistance of the assistant superintendent of Finance, develops performance reports for the attendance officer program that link its results with attendance rates and additional state funding.	September 1998

FISCAL IMPACT

A 1 percent increase in SISD's overall attendance rate would result in 210 additional students, in average daily attendance, based on 1996-97 enrollment (1 percent of 21,098 students). This increase would generate an additional \$554,610 in state aid annually (210 students at \$2,641 each). The average salary and benefits of attendance officers is \$21,617 annually. Fifteen additional attendance officers would entail an additional cost of \$324,255 (15 officers at \$21,617 each). Training in improved classroom management skills could be conducted with existing staff development days and thus would not entail any additional cost. Net revenue generated in this recommendation is estimated at about \$217,200 annually.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Link number of attendance officers to attendance rates	\$230,355	\$230,355	\$230,355	\$230,355	\$230,355

FINDING

The El Paso metropolitan area is moving eastward, accelerating population and enrollment growth within SISD's boundaries. Enrollment at SISD has risen as a consequence, from 16,757 in 1992-93 to 21,098 in 1996-97, an increase of 22 percent. Although the overall level of criminal activity in

district facilities is minor, increased enrollment has been accompanied by increased criminal activity. As illustrated in **Exhibit 12-16**, criminal activity reported by SISD has risen from 284 incidents in 1994-95 to 401 incidents in 1996-97.

Exhibit 12-16

Criminal Activity Statistics Reported by SISD

1994-95 through 1996-97

Incident	1994-95	1995-96	1996-97
Homicide	0	0	0
Sex Crime	2	1	2
Gang Fight	10	9	15
Weapon	8	4	5
Drugs	13	19	28
Kidnap	2	0	3
Traffic	38	40	38
Burglary	16	19	9
Theft	46	53	53
Assault	15	18	20
Threat	8	9	10
Criminal Mischief	63	97	104
Criminal Trespassing	9	10	5
Information	54	94	109
Total	284	373	401

Source: Department of Security Services, SISD

As shown in **Exhibit 12-16**, assaults have increased from 15 incidents annually to 20 incidents; the incidence of gang fights increased from 10 incidents in 1994-95 to 15 in 1996-97. Some of the principal gangs operating in SISD include Barrio Campestre, Moon City Locals, The Cholo Posse, Lower Valley Kings, Barrio Nuevo, Death Crowd, Familia Nueva, Lil Locos, Los Fatherless Gang, San Angelo Gang, and Varrio Soco Loco. In the El Paso metropolitan area, the El Paso Police

Department has identified a total of 596 gangs and approximately 1,500 gang members.

Although student referrals, to a disciplinary authority in the district, such as a principal, for discipline-related incidents have risen by 73 percent since 1992-93, incidents have actually declined on a per-student basis (**Exhibit 12-17**).

Exhibit 12-17

Students Referred For Participation

In Discipline-Related Incidents

1992-93 through 1996-97

Incident	1992-93	1993-94	1994-95	1995-96	1996-97
Gang	37	65	60	49	51
Weapon	0	19	12	8	16
Drugs	287	90	99	116	154
Assault	11	67	53	323	354
Threat	0	0	0	0	0
Criminal mischief	0	27	6	23	6
Criminal trespass	0	0	0	0	0
Other	0	0	0	0	0
Total	335	268	230	519	581
Enrollment	16,757	17,608	18,822	20,141	20,500
Incident-to-Student Ratio	1:50	1:66	1:81	1:39	1:35

Source: Department of Student Services, SISD

The growth in discipline-related incidents is being driven by increases in assault-related incidents. Assault-related incidents rose from 53 in 1994-95 to 354 in 1996-97. The incident-to-student ratio peaked at one incident annually for every 81 students in 1994-95 and subsequently declined to 1:35 in 1996-97.

Placement in an alternative education setting or expulsion from school declined from 571 in 1992-93 to 281 in 1996-97 (**Exhibit 12-18**).

Exhibit 12-18

Discipline Referrals

1992-93 through 1996-1997

	1992-93	1993-94	1994-95	1995-96	1996-97
Removals *	543	670	238	257	253
Expulsions	28	21	18	9	28
Total	571	691	255	266	281

*Note: * Removal from traditional classroom setting to alternative education setting.*

Source: Department of Student Services, SISD

Only 12 of SISD's 43 security personnel are certified peace officers. SISD is facing an increase in criminal and discipline-related incidents with a security force that is trained in security rather than law enforcement.

Although the Texas Education Code allows Security Services to become a police department, the district's board has not approved the establishment of a formal police department. Security Services is not required to comply with the state's training requirements for certified peace officers, which include 560 hours of training in state law, search and seizure procedures, defensive driving, and firearms. This training is provided at 102 police academies located throughout the state.

Some school administrators frequently ask for law enforcement services from school resource officers rather than the district's security officers. KEYS Academy, which serves students with the severest behavioral problems, requires the services of the Socorro Police Department on a weekly basis. None of the three security officers at KEYS Academy are certified peace officers and thus they cannot arrest or issue citations to students for violations of the law.

The structure and management of security operations varies among school districts. Laredo ISD contracts for its law enforcement services with the Laredo Police Department, while the United Independent School District operates a certified, in-house police department. Like SISD, Pharr-San Juan-Alamo ISD operates an in-house security department (**Exhibit 12-19**).

Exhibit 12-19

Police Functions in Selected School Districts

Characteristic	Laredo	United	Socorro	Pharr -San Juan-Alamo
1996-97 Enrollment	22,987	21,387	21,098	20,362
Type of Security Operation	Contracted Security and Police	In-house Police Dept.	In-house Security Dept.	In-house Security Dept.
Year Police Dept. Established	NA	1994	NA	NA
Number of Peace Officers	15	6	12	1
Number of Security Personnel	35	34	31	36
Ratio of Personnel to Students	1:460	1:535	1:490	1:550
Percent of Certified Peace Officers	30%	15%	28%	3%

NA indicates not applicable.

Source: Department of Security Services, SISD and selected school districts

Recommendation 113:

Replace five security guards with contracted certified peace officers at KEYS Academy and selected schools.

The assistant superintendent of Administration should negotiate contracts with local law enforcement agencies, including the El Paso County Sheriff's Department, El Paso Police Department, and Socorro Police Department, to provide peace officers at KEYS Academy and selected district schools with high numbers of criminal and discipline-related incidents.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The assistant superintendent of Administration, assisted by the coordinator of Security Services, examines the criminal activity and discipline-related incidents at district	May 1998
---	---	----------

	schools.	
2	The assistant superintendent of Administration and coordinator of Security Services determine the schools with greatest need for increased law enforcement.	June 1998
3	The assistant superintendent of Administration and coordinator of Security Services develop a plan to provide contracted peace officers at selected schools and presents it to the superintendent and board for approval.	July 1998
4	The superintendent and the board approve, with any necessary changes, the plan for providing contracted peace officers at selected schools.	August 1998
5	The assistant superintendent of Administration enters into negotiations with the chiefs of police of the County of El Paso, City of El Paso, the City of Socorro to provide contracted peace officers at KEYS Academy and other identified schools.	September 1998
6	Contracted, certified peace officers are assigned to KEYS Academy and other identified schools with high incidences of criminal and discipline-related incidents.	January 1999

FISCAL IMPACT

The estimate assumes that the district contracts for four certified peace officers at a cost of \$26,500 annually in salaries and benefits each, or a total of \$106,000 annually.

These additional peace officers should allow SISD to reduce security guard staffing by two positions at KEYS Academy and three positions at district high schools, saving an estimated \$93,210 annually in salaries and benefits (five security guards at \$18,642 each in salaries and benefits.)

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Replace security guards with certified peace officers	(\$12,790)	(\$12,790)	(\$12,790)	(\$12,790)	(\$12,790)

FINDING

El Paso is a gateway for narcotics, with thousands of pounds of drugs crossing the border daily (**Exhibit 12-20**).

Exhibit 12-20

Drug Seizures by Agency in El Paso County

1996

Agency	Marijuana	Cocaine	Heroin	Methamphetamine
US Border Patrol - El Paso	83,919	3,300	28.7	23.90
US Border Patrol - Other	24,522	2,943	57.3	22.90
El Paso Police Department	14,087	209	4.2	2.74
El Paso Sheriff's Office	11,790	78	0.7	22.15
Drug Enforcement Agency	41,465	5,088	26.2	11.86
Other	123,982	10,671	91.3	23.95
Total	299,765	22,289	208.4	107.5

Note: All amounts are in pounds.

Source: El Paso County Metro Narcotics Task Force, Special Operations, El Paso Sheriff's Office

This astonishing flow of drugs means that they are more easily obtained, and at cheaper prices, in the El Paso area than in other parts of the country. In addition, the proximity of the Mexican border provides students with easy access to alcohol and inexpensive pharmaceutical drugs such as Rohypnol and Valium. These factors also increase the likelihood of student experimentation with drugs.

Drug-related activity is on the rise in SISD, particularly at its high schools. Drug-related incidents in SISD high schools doubled over the past three years (**Exhibit 12-21**).

Exhibit 12-21

Drug-Related Criminal Activity Statistics

1994-95 through 1996-97

School	1994-95	1995-96	1996-97
High Schools			
Montwood	0	1	6
Socorro High	5	5	7
Americas *	NA	1	4
KEYS Academy	5	3	5
Total	10	10	22
Middle Schools			
Montwood	0	0	0
Salvador H. Sanchez	1	0	1
Socorro Middle	1	1	0
Walter E. Clark	0	0	1
William D. Slider	0	0	0
Total	2	1	2
Elementary Schools			
Benito Martinez	0	0	0
Campestre	0	2	1
Chavez	0	0	0
Escontrias ECC	0	0	0
Escontrias Elementary	0	1	0
H. D. Hilley	0	0	0
Helen Ball	0	1	0
Horizon Heights	0	0	0
Hueco	0	0	0
Myrtle Cooper	0	1	0
O'Shea Keleher	0	0	0
Robert Rojas	0	0	0
Sierra Vista	0	0	0
Vista Del Sol	0	0	0

Total	0	5	1
Overall Total	12	16	25

*Consists of grades 6 to 9 in 1995-96 and grades 7 to 10 in 1996-97.
Source: Department of Student Services, SISD*

Recommendation 114:

Negotiate with surrounding school districts to obtain the services of a drug-detecting dog and conduct quarterly spot inspections for drugs on school property.

SISD should negotiate with school district such as Ysleta, San Elizario, Clint, Fabiens, and Tornillo ISDs, to share the cost and use of a drug-detecting dog. The dog should be housed in a facility mutually agreed upon by the districts.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The coordinator of Security Services negotiates with other school districts to purchase and share the use of a drug-detecting dog.	October 1998
2	SISD and other school districts purchase and begin using the services of a drug-detecting dog.	November 1998

FISCAL IMPACT

The initial cost of purchasing the dog, training it and its handler, and building a kennel is estimated at \$7,500. The annual cost of food and other care is estimated at \$750. The district's share would be one-fifth of these costs, should Ysleta, San Elizario, Clint, Fabiens, and Tornillo ISD's participate in the agreement.

Recommendation	1998-99	1999-00	2000-01	2001-02	2002-03
Negotiate with school districts to obtain services of drug-detecting dog	(\$7,500)	\$0	\$0	\$0	\$0
Provide food and other care required during the year	(\$750)	(\$750)	(\$750)	(\$750)	(\$750)
Total	(\$8,250)	(\$750)	(\$750)	(\$750)	(\$750)

FINDING

Security Services is unable to enforce district policies regulating the use of school facilities after operating hours, resulting in costly repairs.

The only district policy regulating the use of facilities after regular operating hours is a one-page memorandum dated October 20, 1994 to all principals from the coordinator of Security Services. The memorandum states the following:

"All campuses are responsible for securing and opening their own schools on a daily basis. Due to personnel shortages, it is suggested each campus be responsible for deactivating alarm systems, turning on lights, or opening schools.

[Security Services is responsible for opening district facilities on the weekends upon request of school administrators. This policy does not apply to the high schools.]

Due to the amount of calls being received on weekends to open campuses, it is suggested you assign your assistant principal or teacher to open your campus and secure it before leaving. The only campus or buildings we will be able to open for is Montwood High School, Socorro High School, the Student Activity Center, and the Ed Center. Also, please call Security and advise that you are entering or will enter the campus. Also advise when you are leaving the campus and that you have secured it. Be sure you have your I.D. badge when you are on your campus."

According to district personnel, the Montwood High School security system is not turned on during the evenings and weekends, increasing the likelihood of substantial theft. Furthermore, school administrators and staff often fail to notify Security Services before using district facilities after regular hours and on weekends.

On October 25, 1997, school staff members left Slider Middle School opened and unattended. The fire department responded to a call reporting a fire there, which turned out to be a white cloud of smoke from expended fire extinguishers. Students had broken the glass of two fire extinguisher cases, set off fire extinguishers throughout the building, and damaged a vending machine. The total damage was estimated at \$400.

Recommendation 115:

Develop formal policies and procedures regulating the use of facilities after hours.

These procedures should include requiring security patrols to ensure security alarms are fully functional at all district facilities during their evening rounds; charging schools for security service calls to facilities left open after school hours; and registering the names of all school personnel with keys and alarm codes with Security Services.

IMPLEMENTATION STRATEGIES AND TIMELINE

1	The coordinator of Security Services develops and recommends formal policies and procedures for regulating the after-hour use of district facilities.	April 1998
2	The superintendent approves, with any necessary changes, these policies and procedures.	May 1998
3	The coordinator of Security Services distributes these policies and procedures to all school principals, directors, assistant superintendents, and security personnel.	June 1998

FISCAL IMPACT

This recommendation should reduce the level of vandalism at school facilities and save money needed to replace damaged or stolen property, while helping to ensure the safety of district personnel and students.

Appendices

Survey Results

As part of its review of SISD, TSPR conducted four surveys. This appendix explains the methodology used to conduct the surveys and summarizes the findings.

A. Survey Methodology

The review team conducted surveys to solicit input from four groups within the SISD community: teachers and school administrators, district administrators, parents, and students.

The survey was constructed to solicit input on the following 12 areas:

- District Organization & Management
- Educational Service Delivery
- Community Involvement
- Human Resources
- Facilities
- Asset & Risk Management
- Purchasing
- Financial Management
- Computer Technology
- Food Services
- Transportation
- Safety and Security

Each survey question was phrased as a statement. Respondents were asked to respond to each statement with one of the following options: no opinion, strongly agree, agree, neutral, disagree, and strongly disagree. Since the statements were phrased positively, responses of strongly agree and agree are positive responses.

The survey also included questions to capture demographic information about the respondents including their gender, ethnicity, position, and school.

Exhibit A-1 summarizes how the surveys were distributed and collected, to whom the surveys were sent, and how many responses were received. As the exhibit shows, the surveys for district staff - teachers, school administrators, and district administrators - were distributed through district mail. Parental surveys were sent directly to the parents' homes. The surveys sent to these groups were distributed with self-addressed, stamped envelopes so that respondents could easily mail the completed survey directly back to the Comptroller of Public Accounts.

Exhibit A-1

Survey Distribution and Collection Summary

Survey	Method of Distribution	Method of Collection	Target Distribution	Number of Responses
Teachers and School Administrators	District mail	Mailed to State Comptroller's office	All school administrators and 1/3 of the teachers at each school	162
District Administrators	District mail	Mailed to State Comptroller's office	All district administrators	34
Parents	US mail	Mailed to State Comptroller's office	240 secondary parents and 240 elementary parents	37
Students	During class	At end of class	Approximately 100 students at Socorro High School and Montwood High School and 50 students at Americas	237

Of the 162 teachers and school administrators who responded, 48 percent work at elementary schools; 25 percent work at middle school; and 22 percent work at high schools.

The 34 parents who responded had children at the following schools:

- Americas
- Benito Martinez
- Escontrias
- Helen Ball
- Hueco
- Montwood Middle School
- Montwood High School
- Myrtle Cooper
- Slider
- Socorro Middle School
- Socorro High School
- Vista Del Sol
- Walter Clarke

The 237 students who responded were from Americas Elementary, Socorro High School, and Montwood High School. Eighty-four percent of the respondents were Hispanic, 8 percent were Anglo, and 3 percent were African-American.

B. Survey Results

This section summarizes findings for each survey. More detailed survey results are included in Appendices B, C, D, and E.

Teacher and School Administrator Survey

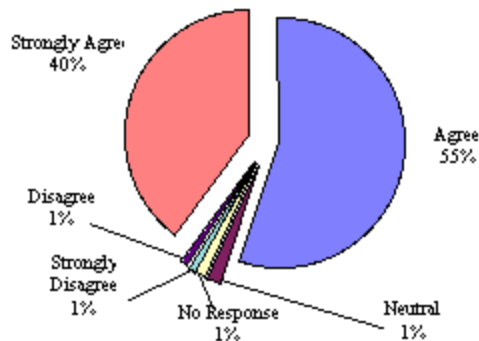
Responses regarding District Organization and Management were very positive. On seven of nine questions, a majority of the respondents agreed or strongly agreed with the statement. The most positive results came in response to the statement "SISD is organized in a way that encourages student performance." Eighty-two percent of school staff agreed or strongly agreed with the statement. The only two statements for which a majority of the school staff did not agree were "SISD is better managed than it was five years ago" and "My principal visits my classroom often enough." But even these statements received somewhat positive responses; 38.3 percent agreed with the first statement and 48.1 percent agreed with the second.

Responses to the statements on Educational Service Delivery also were positive. Twenty of the 24 statements received responses of agree or strongly agree. The only four statements to which a majority of respondents did not agree or strongly agree were "SISD's curriculum is coordinated among all schools," "Grading is consistent across all schools," "Student performance standards are consistent across schools," and "The vocational education program at my school effectively educates students." The most positive response came to the statement: "The quality of instruction in SISD is good." Almost 40 percent of respondents strongly agreed and slightly over 55 percent agreed. Responses to this statement are presented in **Exhibit A-2**.

Exhibit A-2

Teacher and School Staff Responses to the statement

"The quality of instruction in SISD is good."



Source: TSPR Survey.

In addition, more than 80 percent of teachers and school administrators responded that the curriculum matches students' needs; teachers do a good job of presenting curriculum; the district does a good job of using TAAS results to improve instruction; and the district does a good job of meeting the needs of a diverse student population.

Responses to community involvement questions were consistently positive. More than 90 percent of respondents agreed or strongly agreed that their schools encourage parents and community members to be involved, and 80 percent responded that parents are actively involved in their schools. About 88 percent responded that the district communicates well with the community and that the community is proud of its schools.

Teachers and school staff also had positive responses to human resource questions. More than 80 percent of respondents agreed that the district does a good job of recruiting and hiring the best qualified teachers, and 79 percent believe that staff development has improved job performance. The only statement with which respondents did not agree was "The district does a good job of addressing poor performing staff." Almost 52 percent of respondent disagreed or strongly disagreed with that statement.

While responses relating to district facilities were generally positive, there seems to be a fairly common belief that some schools are overcrowded. Thirty percent of teachers and school staff disagreed with the statement, "my school's facilities are not overcrowded."

While respondents also felt positively about asset and risk management, more than 40 percent responded that they were not satisfied with their health coverage and co-pay requirements.

Responses regarding financial management also were generally favorable. Respondents feel that the district allocates funds fairly among schools

(55.5 percent) and programs (54.9 percent) and that the budgeting process works well. However, only 35.2 percent believe that the district's financial situation is better today than it was five years ago.

Teachers and school staff also had generally favorable responses to purchasing questions, but there were two statements to which responses were split. When asked to respond to the statement, "The requisition process for obtaining supplies is efficient," 51 percent agreed but 33 percent disagreed. When asked to respond to "The requisition process for obtaining equipment is efficient," 47 percent agreed and 28 percent disagreed.

Responses to statements about food services, transportation, computers and technology and safety and security were consistently positive. According to respondents, district buses and drivers are safe, on time, and dependable. They also believe that the food is of high quality and reasonable cost and is provided with good service in a clean environment. They feel that schools are safe. They also believe that technology has been well implemented, helps them do their jobs more effectively, and is available and well-supported. The only statements in these three areas to which more than 20 percent of the respondents disagreed were "Food waste is kept to a minimum" (21.6 percent), "The student code of conduct is applied consistently across schools" (22.2 percent), and "Management Information System (MIS) requests are completed quickly" (24.7 percent).

District Staff Survey

Responses from district staff were consistently positive across functional areas. Responses were so positive that it was notable when more than 20 percent of respondents disagreed with a statement. These areas of concern are consistent with responses received from the teachers and school staff.

Slightly more than 20 percent of district staff disagreed or strongly disagreed with the statement, "The district does a good job of recognizing superior staff performance," and more than 26 percent disagreed with the statement, "The district does a good job of recognizing superior staff performance."

Also, 32.3 percent responded that the process for obtaining supplies is not efficient and 26.4 percent felt that the process for obtaining equipment is not efficient.

Parent Survey

Parents appear to feel that their participation in schools is encouraged and that they are welcome in the schools. Seventy-three percent of parents

responded that they are encouraged to become involved in their schools and that they feel welcome at their child(ren)'s school.

Parents are happy with the condition of the schools, but some are concerned that schools may be overcrowded. More than 83 percent of parents responded that their child(ren)'s school(s) are well-maintained and clean. Like the district administrators, several parents (19 percent) responded that their child(ren)'s school is overcrowded.

Finally, parents are very satisfied with most aspects of the food service in the district's schools. More than 86 percent responded that their children eat lunch at a reasonable cost and at an appropriate time. Unfortunately, 32 percent felt that their children may spend too much time waiting in lines in the cafeteria.

Student Survey

More than 71 percent of students responded that they like going to school. Seventy percent believe that their teacher explains materials and assignments clearly, 73 percent believe that their teachers care about how well they do, and 82 percent agreed that their teachers treat them with respect.

According to students, the district does a good job of providing supplies and textbooks. Seventy-one percent agreed that their classes have enough books, supplies, and classroom materials for all students, and 77 percent responded that textbooks are available on the first day of class.

Students agree with their parents about the condition of the facilities. Eighty-four percent responded that their school is clean and 78 percent believe that their school is well maintained.

The most negative response was in the area of food services. Sixty percent of students responded that lunch time was not long enough to buy and eat lunch.

Appendix B - SISD Teacher & School Administrator Survey

Question	Total	No Response	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	No Opinion
1) District Organization & Management								
a) SISD board members make sound decisions.	162	3.7	6.2	48.8	16.7	16.7	2.5	5.6
b) The superintendent communicates well with my school.	162	1.2	13.0	45.1	22.8	11.1	0.6	6.2
c) The central administration communicates well with my school.	162	3.1	11.7	46.9	22.2	8.6	1.2	6.2
d) The SISD superintendent works well with school	162	1.2	14.2	47.5	22.8	3.7		10.5
e) The SISD central administration staff works well with school staff.	162	1.9	12.3	54.9	17.3	6.8	0.6	6.2
f) SISD is organized in a way that encourages student performance.	162	1.9	35.8	46.3	6.8	7.4		1.9
g) SISD is better managed than it was five	162	2.5	9.9	28.4	29.6	14.2	1.9	13.6

years ago.								
h) My principal is a strong instructional leader.	162	27.2	23.5	31.5	6.8	4.3	4.3	2.5
i) My principal visits my classroom often enough.	162	28.4	19.1	29.0	5.6	8.0	4.3	5.6
2) Educational Service Delivery								
a) The quality of instruction in SISD is good.	162	0.6	39.5	56.2	1.9	1.2	0.6	
b) The quality of instruction in SISD is better than it was five years ago.	162	1.2	25.9	37.7	16.7	4.9	0.6	13.0
c) Instructional supplies are readily available.	162	1.2	18.5	46.3	11.1	15.4	6.8	0.6
d) Students at my school effectively use computers as part of their educational programs.	162	0.6	31.5	46.9	9.3	9.9	1.2	0.6
e) The curriculum matches student academic needs at my school.	162	1.2	24.1	60.5	6.8	6.2	1.2	
f) SISD's	162	1.9	21.0	58.0	6.2	7.4	0.6	4.9

curriculum is coordinated from grade to grade at my school.								
g) SISD's curriculum is coordinated among all schools.	162	0.6	8.0	32.7	27.8	18.5	3.1	9.3
h) I am given adequate guidance by upper administrators in implementing the curriculum.	162	0.6	15.4	54.3	13.6	13.0	1.2	1.9
i) Our school's teaching staff does a good job of presenting the curriculum to students.	162	1.9	25.9	63.6	6.2		1.2	1.2
j) Grading is consistent across all schools.	162	1.2	4.3	30.2	29.0	24.7	2.5	8.0
k) Student performance standards are consistent across all schools.	162	1.2	8.0	32.7	22.2	25.3	2.5	8.0
l) SISD uses TAAS results to improve instruction.	162	1.2	31.5	56.8	4.3	3.7		2.5
m) SISD does a good job of	162	0.6	25.3	60.5	6.8	6.2	0.6	

meeting the educational needs of a diverse student population.								
n) SISD students graduate with the skills they need to prepare them for the future.	162	0.6	19.1	47.5	19.1	7.4	1.9	4.3
o) The regular education program at my school effectively educates students.	162	0.6	24.7	61.1	6.2	4.9	1.2	1.2
p) The special education program at my school effectively educates students.	162	0.6	22.2	52.5	13.0	4.9	0.6	6.2
q) The special education program at my school identifies the right students to receive services.	162	0.6	24.1	53.7	12.3	3.1	0.6	5.6
r) The compensatory education program at my school effectively educates students.	162	1.2	16.7	47.5	17.9	1.9		14.8

s) The compensatory education program at my school identifies the right students to receive the services.	162	0.6	18.5	45.1	19.1	0.6		16.0
t) The vocational education program at my school effectively educates students.	162	4.9	10.5	21.6	22.2	1.9		38.9
u) The bilingual/ESL program at my school effectively educates students.	162	1.2	22.2	45.1	10.5	9.9	3.7	7.4
v) The bilingual/ESL program at my school effectively identifies the right students to receive services.	162	0.6	23.5	50.0	12.3	6.8	1.2	5.6
w) The gifted and talented program at my school effectively educates students.	162	0.6	19.8	50.6	11.1	6.8	3.1	8.0
x) The gifted and talented program at my	162	0.6	16.0	53.7	14.2	5.6	2.5	7.4

school identifies the right students to receive services.									
y) Year-round schools are effective in educating the district's students.	162	0.6	27.2	43.2	12.3	8.0	6.8	1.9	
z) Providing year-round schools saves money for the district.	162	1.2	12.3	22.2	24.1	21.6	8.0	10.5	
z) The special education and regular education teachers collaborate to meet the educational needs of special education students.	162	0.6	24.7	55.6	9.3	7.4	0.6	1.9	
3) Personnel Management									
a) The staff development I have received has improved my job performance.	162	0.6	26.5	52.5	9.9	7.4	3.1		
b) The district does a good job of recruiting the best possible teachers.	162	0.6	33.3	48.8	8.6	6.2	0.6	1.9	
c) The district	162	0.6	30.2	53.1	9.9	5.6	0.6		

does a good job of hiring the best possible teachers.								
d) The district is able to retain qualified employees.	162	1.2	22.2	53.1	12.3	8.6	1.2	1.2
e) Vacant positions are filled in a timely manner.	162	1.9	12.3	53.1	10.5	16.7	3.1	2.5
f) Teacher absenteeism is minimal.	162	1.2	8.6	46.9	23.5	11.1		8.6
g) Other employee absenteeism is minimal.	162	1.2	6.8	46.9	20.4	6.8		17.9
h) The district does a good job of recognizing superior staff performance.	162	1.9	11.7	45.7	17.3	19.1	1.9	2.5
i) The district does a good job of addressing poor performing staff.	162	1.2	6.2	30.9	32.1	19.8	3.1	6.8
j) The staff evaluation process has improved my ability to do my job.	162	0.6	9.9	47.5	21.6	13.6	3.7	3.1

k) When a teacher is absent, a substitute teacher is contacted and arrives in the classroom in a timely manner.	162	1.9	11.7	52.5	11.7	12.3	3.7	6.2
l) I am satisfied with my salary.	162	0.6	11.1	45.1	11.7	23.5	8.0	
m) I am satisfied with my benefits.	162	0.6	9.9	42.0	13.0	23.5	10.5	0.6
4) Community Involvement								
a) My school encourages parents to be involved.	162	45.7	48.8	3.7		1.9		
b) My school encourages community members to be involved.	162	42.6	50.6	3.7	0.6	1.9	0.6	
c) Parents are actively involved in my school.	162	0.6	33.3	45.7	11.1	6.8	1.9	0.6
d) Community members are actively involved in my school.	162	26.5	46.3	17.3	5.6	1.9	2.5	
e) SISD communicates well with the community.	162	27.8	61.1	4.3	3.7	0.6	2.5	
f) The community is	162	2.5	37.7	50.0	6.2	0.6		3.1

proud of the schools in SISD.									
g) The district often solicits comments and suggestions from the community.	162	2.5	21.6	55.6	10.5	4.3	0.6	4.9	
h) The community often provides comments and suggestions to the district.	162	2.5	19.1	52.5	13.0	1.9	0.6	10.5	
i) The district takes advantage of community comments and suggestions.	162	2.5	18.5	46.3	16.7	3.7	0.6	11.7	
j) The community is more involved in SISD than it was five years ago.	162	3.1	17.3	40.7	16.0	3.7	1.2	17.9	
5) Facilities Use and Management									
a) My school is kept clean.	162	3.1	37.7	46.9	6.8	4.9	0.6		
b) My school's facilities are well maintained.	162	2.5	32.7	50.0	8.0	6.2	0.6		
c) My school's facilities are not overcrowded.	162	2.5	12.3	43.2	11.1	25.9	4.3	0.6	
d) Services provided by SISD's	162	3.1	10.5	54.9	17.9	11.1	1.9	0.6	

facilities department meet or exceed my expectations.								
e) Construction programs at SISD are well planned.	162	3.1	9.9	40.1	19.8	16.0	4.3	6.8
f) Construction programs at SISD are well managed.	162	2.5	8.0	40.7	26.5	11.7	3.1	7.4
g) Attendance zones at SISD are well designed.	162	2.5	4.9	39.5	23.5	14.8	2.5	12.3
h) SISD sets appropriate priorities for facility additions and improvements.	162	3.1	6.8	41.4	22.2	13.6	3.7	9.3
i) SISD facilities are in better condition than they were five years ago.	162	3.1	11.7	45.1	14.8	6.2	1.9	17.3
6) Asset & Risk Management								
a) The equipment I use is replaced when necessary.	162	2.5	6.8	63.0	10.5	13.6	1.9	1.9
b) SISD has adequate safety policies and	162	2.5	16.7	67.3	9.3	1.9		2.5

procedures to avoid on-the-job injuries.								
c) I am satisfied with my health coverage and co-pay requirements.	162	3.1	9.9	30.9	16.0	22.8	17.3	
7) Financial Management								
a) The district allocates funds fairly among schools.	162	2.5	8.0	47.5	16.7	9.9	1.2	14.2
b) The district allocates funds fairly among educational programs.	162	3.1	7.4	47.5	18.5	13.6	2.5	7.4
c) The district budgeting process works well.	162	3.1	8.0	42.0	21.0	15.4	1.9	8.6
d) My school budgeting process works well.	162	2.5	9.9	53.7	16.0	10.5	3.7	3.7
e) I know how district funds are spent.	162	2.5	6.8	43.2	18.5	16.0	3.7	9.3
f) I have a say in deciding how funds are spent at my school.	162	3.7	20.4	46.3	14.8	10.5	3.1	1.2
g) I am satisfied with my ability to obtain accurate, consistent, and	162	2.5	13.6	48.1	14.2	13.6	3.1	4.9

timely financial information.								
h) SISD's financial situation is better than it was five years ago.	162	1.9	6.2	29.0	19.1	14.2	3.1	26.5
8) Purchasing								
a) The requisition process for obtaining supplies is efficient.	162	1.9	3.1	48.1	13.0	22.2	10.5	1.2
b) The requisition process for obtaining equipment is efficient.	162	1.9	3.7	43.2	17.9	20.4	8.0	4.9
c) Purchasing procedures are clearly documented and easy to understand.	162	2.5	3.7	49.4	18.5	13.6	5.6	6.8
d) I can obtain textbooks when I need them.	162	2.5	6.2	47.5	15.4	13.0	3.1	12.3
e) The district strictly adheres to its purchasing documents.	162	1.9	9.3	45.1	16.7	3.7	1.9	21.6
f) Minimal signatures are required on purchasing	162	3.1	4.9	43.2	14.2	12.3	4.9	17.3

documents.								
g) The textbook issuance process is efficient.	162	1.9	7.4	52.5	14.2	4.9	3.1	16.0
h) The textbook return process is efficient.	162	1.9	8.0	51.2	15.4	1.2	3.1	19.1
i) SISD's purchasing processes are better than they were five years ago.	162	2.5	2.5	25.9	25.3	9.3	3.7	30.9
9) Transportation								
a) The school buses are safe.	162	1.9	13.6	58.0	9.9	3.1	0.6	13.0
b) The school buses are on time.	162	2.5	11.1	59.9	9.3	4.9	0.6	11.7
c) The school buses have minimal breakdowns.	162	1.9	11.7	50.6	13.6	4.3		17.9
d) The school buses adequately serve the students in extracurricular activities.	162	1.9	14.8	58.0	7.4	5.6	1.2	11.1
e) School bus drivers are dependable.	162	1.9	11.7	62.3	9.3	3.1	0.6	11.1
f) School bus drivers are friendly and helpful to	162	1.9	14.8	53.7	14.2	1.2	0.6	13.6

g) Students at my school do not spend too much time traveling to school or home on the bus.	162	1.9	11.7	51.2	12.3	7.4	1.2	14.2
h) SISD's transportation is better than it was five years ago.	162	1.9	10.5	30.2	19.8	1.9		35.8
10) Food Services								
a) The food served in the cafeteria is of high quality.	162	1.9	11.7	46.9	13.0	16.7	6.2	3.7
b) The cafeteria is clean.	162	1.9	19.1	64.2	10.5	1.2	0.6	2.5
c) Food is available at a reasonable cost.	162	0.6	16.0	58.6	5.6	12.3	4.3	2.5
d) Waiting time in lunch lines is kept to a minimum.	162	1.2	9.9	53.1	9.3	17.9	6.8	1.9
e) Food waste is kept to a minimum.	162	1.2	5.6	35.8	24.1	16.7	4.9	11.7
f) Food is provided with good service.	162	0.6	19.8	62.3	8.6	4.9	1.2	2.5
g) Lunch periods start at a reasonable time.	162	1.2	16.0	75.3	3.7	1.2	0.6	1.9
h) Food	162	0.6	21.0	51.2	11.7	4.9	1.2	9.3

services takes adequate steps to conceal the identity of students who are receiving free or reduced price lunches from other students.									
i) SISD food service is better than it was five years ago.	162	1.9	16.0	27.2	19.8	6.8	1.9	26.5	
11) Safety & Security									
a) My school is safe and secure.	162	1.2	23.5	62.3	7.4	4.3	1.2		
b) Alcohol, drug, and tobacco use is not a problem among students at my school.	162	0.6	29.6	42.0	6.8	15.4	4.9	0.6	
c) SISD's anti-drug and anti-violence programs are effective.	162	0.6	19.8	49.4	16.7	7.4	3.1	3.1	
d) The student code of conduct is applied consistently across schools.	162	0.6	16.0	43.8	12.3	18.5	3.7	4.9	
e) The student code of conduct is applied	162	0.6	16.7	55.6	6.2	13.6	4.9	2.5	

consistently among students.									
f) SISD has adequate security personnel to maintain a safe school environment.	162	0.6	13.6	58.6	14.2	6.8	2.5	3.7	
g) My school effectively handles student misbehavior.	162	0.6	21.0	54.9	4.9	11.7	4.9	1.9	
h) SISD's security services effectively responds to calls for assistance.	162	0.6	17.3	52.5	11.1	3.1	1.9	13.6	
i) My school is safer that it was five years ago.	162	0.6	10.5	28.4	22.8	8.6	1.9	27.2	
j) School violence has increased in my school in the past five years.	162	0.6	4.3	7.4	14.2	38.3	16.0	19.1	
k) School violence has decreased in the district in the past five years.	162	0.6	8.0	22.2	28.4	10.5	1.9	28.4	
12) Computers & Technology									
a) Technology is readily	162	2.5	31.5	53.7	3.1	6.8	1.9	0.6	

available for me to complete my administrative tools.								
b) I am given adequate support to effectively use technology.	162	1.9	30.9	50.6	6.8	7.4	1.9	0.6
c) I have been given adequate training to effectively use technology.	162	2.5	25.9	49.4	11.1	8.6	1.9	0.6
d) The district effectively uses technology to support instruction and student learning.	162	1.9	32.7	51.2	8.0	4.3	1.2	0.6
e) The district effectively uses technology to support and streamline administrative functions.	162	2.5	27.8	44.4	8.6	7.4	2.5	6.8
f) Technology in the district is well planned.	162	1.9	22.8	46.3	11.1	12.3	1.9	3.7
g) Technology in the district is well implemented.	162	2.5	21.6	44.4	14.8	12.3	2.5	1.9
h) District technology	162	2.5	23.5	51.9	14.8	3.7	1.9	1.9

staff are customer friendly and help me do my job.								
i) Management Information System (MIS) requests are completed quickly.	162	1.9	11.7	30.2	14.8	19.8	4.9	16.7
j) MIS requests are completed within a few hours.	162	3.1	11.1	34.6	20.4	8.6	4.3	17.9
k) Computer downtime is minimal.	162	1.9	10.5	57.4	11.7	8.6	2.5	7.4
l) SISD's computer systems are better today than they were five years ago.	162	1.9	36.4	30.9	6.2	6.2	1.2	17.3
m) Technology is readily available for me to educate students.	162	30.9	24.1	30.9	3.7	6.2	2.5	1.9
n) I feel comfortable using computers as part of my class.	162	29.6	22.8	31.5	7.4	5.6	1.2	1.9

Appendix C - SISD District Administrator Survey

Question	Total	No Response	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	No Opinion
1) District Organization & Management								
a) SISD board members make sound decisions for the district.	34		14.7	58.8	17.6	5.9		2.9
b) SISD board members deal with policy issues rather than day-to-day operations.	34		14.7	50.0	17.6	11.8	5.9	
c) The superintendent communicates well with school staff.	34		35.3	47.1	17.6			
d) The central administration staff communicates well with school staff.	34		29.4	50.0	17.6	2.9		
e) The SISD superintendent works well with school with school staff.	34		38.2	44.1	14.7			2.9
f) The SISD central administration staff works well with school staff.	34		38.2	47.1	11.8	2.9		
g) SISD is organized in a way that encourages student performance.	34		61.8	29.4				8.8
h) SISD is organized in a way	34		41.2	50.0	8.8			

that encourages staff performance.								
i) SISD has implemented a long-range plan.	34		38.2	44.1	17.6			
j) SISD's long-range plan is used in district decision-making.	34		32.4	50.0	14.7	2.9		
k) SISD is better managed today than it was five years ago.	34		14.7	47.1	14.7	14.7	2.9	5.9
2) Educational Service Delivery								
a) The quality of instruction in SISD is good.	34		55.9	44.1				
b) Instructional supplies are readily available.	34		35.3	44.1	5.9	5.9		8.8
c) All students effectively use computers as part of their educational program.	34		29.4	52.9	5.9	2.9		8.8
d) The curriculum matches student academic needs.	34		26.5	58.8	8.8	5.9		
e) Teachers are given adequate guidance in implementing the curriculum.	34	2.9	20.6	44.1	20.6	2.9		8.8
f) SISD's curriculum is coordinated from grade to grade within each school.	34	5.9		55.9	14.7	8.8		14.7
g) SISD's curriculum is	34		2.9	41.2	26.5	14.7		14.7

coordinated among all schools.								
h) Grading is consistent across all schools.	34		2.9	44.1	17.6	17.6		17.6
i) Student performance standards are consistent across all schools.	34		5.9	52.9	14.7	14.7		11.8
j) SISD uses TAAS results to improve instruction.	34		17.6	70.6	2.9			8.8
k) SISD does a good job of meeting the educational needs of a diverse student population.	34		29.4	64.7	5.9			
l) SISD students graduate with the skills they need to prepare them for the future.	34		20.6	64.7	14.7			
m) Year-round schools are effective in educating the district's students.	34		32.4	50.0	8.8	8.8		
n) Providing year-round schools saves money for the district.	34		17.6	38.2	23.5	14.7		5.9
o) The quality of instruction in SISD is better than it was five years ago.	34		32.4	47.1	8.8	5.9		5.9
3) Personnel Management								
a) The staff	34	2.9	23.5	52.9	8.8	2.9		8.8

development that the district provides its teaching staff helps them meet student needs.								
b) The staff development that the district provides its administrative staff helps them work with schools.	34		20.6	64.7	5.9	5.9		2.9
c) The district does a good job of recruiting the best qualified employees.	34		32.4	61.8	2.9	2.9		
d) The district does a good job of hiring the best qualified employees.	34		26.5	64.7	5.9	2.9		
e) The district is able to retain qualified employees.	34		23.5	50.0	11.8	8.8	2.9	2.9
f) Vacant positions are filled in a timely manner.	34		14.7	47.1	20.6	8.8	5.9	2.9
g) Teacher absenteeism is minimal.	34		5.9	50.0	14.7	2.9		26.5
h) Other employee absenteeism is minimal.	34			61.8	20.6	5.9		11.8
i) The district does a good job of recognizing superior staff performance.	34		11.8	55.9	11.8	17.6	2.9	

j) The district does a good job of addressing poor staff performance.	34		8.8	38.2	23.5	17.6	8.8	2.9
k) The staff evaluation process has improved my ability to do my job.	34		8.8	41.2	38.2	8.8		2.9
l) I am satisfied with my salary.	34		5.9	61.8	14.7	11.8	5.9	
m) I am satisfied with my benefits.	34		14.7	58.8	17.6	8.8		
4) Community Involvement								
a) Parents are actively involved in SISD's schools.	34		41.2	50.0	5.9			2.9
b) Community members are actively involved in SISD's schools.	34		35.3	55.9	5.9			2.9
c) SISD communicates well with the community.	34		32.4	58.8	8.8			
d) The community is proud of the schools in SISD.	34		50.0	47.1	2.9			
e) The district solicits comments and suggestions to the district.	34		32.4	58.8	5.9			2.9
f) The community provides comments and suggestions to the district.	34		26.5	64.7	8.8			
g) The district takes advantage of community comments and	34		23.5	55.9	17.6	2.9		

suggestions.								
h) The community is more involved in SISD than it was five years ago.	34		35.3	38.2	14.7	2.9		8.8
5) Facilities Use and Management								
a) SISD facilities are clean.	34		47.1	50.0	2.9			
b) SISD's facilities are well maintained.	34		47.1	47.1	2.9	2.9		
c) SISD's facilities are not overcrowded.	34		23.5	41.2	17.6	11.8	2.9	2.9
d) Services provided by SISD's facilities department meet or exceed my expectations.	34		23.5	58.8	8.8	2.9	2.9	2.9
e) Attendance zones at SISD are well designed.	34		11.8	50.0	17.6	11.8	2.9	5.9
f) SISD sets appropriate priorities for facility additions and improvements.	34		11.8	67.6	5.9	5.9	2.9	5.9
g) SISD has appropriate energy management and conservation programs.	34		11.8	61.8	14.7	2.9		8.8
h) SISD facilities are in better condition than they were five years ago.	34		32.4	47.1	8.8			11.8
6) Asset & Risk Management								

a) Equipment in SISD is replaced when necessary.	34		14.7	58.8	11.8	11.8		2.9
b) SISD has adequate safety policies and procedures to avoid on-the-job injuries.	34		26.5	64.7	2.9	2.9		2.9
c) I am satisfied with my health coverage and co-pay requirements.	34		11.8	47.1	11.8	23.5	2.9	2.9
7) Financial Management								
a) The district allocates funds fairly among schools.	34		20.6	55.9	11.8			11.8
b) The district allocates funds fairly among educational programs.	34	14.7	67.6	8.8			8.8	
c) The district budgeting process works well.	34		17.6	58.8	14.7	2.9		5.9
d) I know how the district funds are spent.	34		14.7	61.8	14.7	2.9	2.9	2.9
e) I have a say in deciding how funds are spent in my area.	34	2.9	35.3	44.1		8.8	5.9	2.9
f) I am satisfied with my ability to obtain accurate, consistent, and timely financial information.	34		17.6	50.0	8.8	14.7	2.9	5.9

g) SISD's financial situation is better than it was five years ago.	34		14.7	47.1	14.7	5.9	5.9	11.8
8) Purchasing								
a) The requisition process for obtaining supplies is efficient.	34		2.9	50.0	11.8	23.5	8.8	2.9
b) The requisition process for obtaining equipment is efficient.	34		2.9	44.1	20.6	17.6	8.8	5.9
c) Purchasing procedures are clearly documented and easy to understand.	34			44.1	35.3	11.8		8.8
d) The district strictly adheres to its purchasing	34		8.8	58.8	17.6	5.9	2.9	5.9
e) Minimal signatures are required on purchasing documents.	34		64.7	8.8	17.6		8.8	
f) The textbook issuance process is efficient.	34		2.9	32.4	20.6		2.9	41.2
g) The textbook return process is efficient.	34		35.3	20.6		2.9	41.2	
h) SISD purchasing processes are better than they were five years ago.	34		5.9	29.4	26.5	11.8	5.9	20.6
9) Transportation								
a) The school	34		17.6	67.6	5.9		8.8	

buses are safe for our students.								
b) The school buses are on time.	34		14.7	52.9	5.9		26.5	
c) The school buses have minimal breakdowns.	34		8.8	38.2	14.7	2.9		35.3
d) The school buses are safe for our drivers.	34	2.9	11.8	55.9	5.9		23.5	
e) The school buses adequately serve the students in extracurricular activities.	34		17.6	47.1	2.9	2.9		29.4
f) School bus drivers are dependable.	34		11.8	61.8	2.9			23.5
g) School bus drivers are friendly and helpful to	34		8.8	58.8	2.9		29.4	
h) Students in SISD do not spend too much time traveling to school or home on the bus.	34		5.9	47.1	17.6	2.9		26.5
i) SISD's transportation is better than it was five years ago.	34		23.5	41.2	14.7		20.6	
10) Food Services								
a) Food is of high quality.	34		17.6	58.8	11.8			11.8
b) The cafeteria is clean.	34		14.7	73.5	2.9	2.9		5.9
c) Food is available at a	34		20.6	73.5	2.9	2.9		

reasonable cost.								
d) Waiting time in lunch lines is kept to a minimum.	34		11.8	55.9	2.9	5.9		23.5
e) Food waste is kept to a minimum.	34		14.7	35.3	8.8	8.8		32.4
f) The food is provided with good service.	34		14.7	70.6		2.9	2.9	8.8
g) Lunch period starts at a reasonable time.	34		11.8	52.9	8.8			26.5
h) Food Services takes adequate steps to conceal the identity of students who are receiving free or or reduced price lunches form other students.	34	2.9	14.7	50.0	8.8		2.9	20.6
i) SISD's food service is better than it was five years ago.	34		2.9	20.6	50.0	8.8	2.9	14.7
11) Safety & Security								
a) Schools in SISD are safe and secure.	34		23.5	70.6	5.9			
b) Alcohol, drug, and tobacco use is not a problem among SISD schools.	34			35.3	35.3	8.8	2.9	17.6
c) The student code of conduct is applied consistently across schools.	34		2.9	64.7	11.8	8.8		11.8
d) The student code of conduct is annlied	34		5.9	67.6	5.9	8.8		11.8

consistently among students.								
e) SISD schools effectively handle student	34		5.9	67.6	8.8	5.9		11.8
f) SISD's anti-drug and anti-violence programs are effective.	34		11.8	55.9	11.8	2.9	2.9	14.7
g) SISD has adequate security personnel to maintain a safe school environment.	34		14.7	52.9	14.7		2.9	14.7
h) Schools in SISD are safer than they were five years ago.	34		20.6	44.1	8.8	2.9		23.5
i) School violence has decreased in SISD in the past five years.	34		14.7	29.4	23.5	2.9		29.4
12) Computers & Technology								
a) Technology is readily available for me to accomplish my administrative duties.	34		50.0	50.0				
b) I am given adequate support to effectively use technology.	34		29.4	47.1	14.7	8.8		
c) I have been given adequate training to effectively use technology.	34	29.4	47.1	8.8	14.7			
d) The district	34		35.3	50.0	8.8		5.9	

effectively uses technology to support instruction and student learning.								
e) The district effectively uses technology to streamline administrative functions.	34		20.6	64.7	8.8	2.9		2.9
f) Technology in the district is well planned.	34		26.5	55.9	8.8		8.8	
g) Technology in the district is well implemented.	34		20.6	50.0	17.6	5.9		5.9
h) District technology staff are customer friendly and help me do my job.	34		11.8	55.9	20.6	8.8	2.9	
i) Management Information Systems (MIS) requests are completed quickly.	34		11.8	35.3	17.6	23.5	5.9	5.9
j) MIS requests are completed with few errors.	34	2.9	5.9	35.3	41.2	8.8		5.9
k) Computer downtime is minimal.	34		8.8	55.9	17.6	14.7		2.9
l) SISD's computer systems are better today than they were five years ago.	34		38.2	50.0	2.9		8.8	

Appendix D - SISD Parent Survey

Question	Total	No Response	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	No Opinion
1) District Organization & Management								
a) SISD board members make sound decisions for the district.	37	5.4	5.4	29.7	24.3	8.1	10.8	16.2
b) SISD board members understand student needs.	37	2.7	5.4	35.1	24.3	13.5	10.8	8.1
c) The SISD superintendent is an effective administrator.	37	2.7	2.7	37.8	32.4	10.8	5.4	8.1
d) The SISD central administrative staff work well with the schools.	37	2.7	8.1	24.3	35.1	10.8	5.4	13.5
e) The principal at my child(ren)'s school is available when I need him/her.	37	5.4	21.6	40.5	16.2	5.4	5.4	5.4
f) I know about the different programs and services provided by SISD.	37	2.7	5.4	45.9	24.3	18.9	2.7	
g) The district	37	2.7	10.8	40.5	24.3	2.7	5.4	13.5

does a good job of recruiting and hiring the best possible teachers.								
h) I am involved in decision making at my child(ren)'s school.	37	2.7	8.1	35.1	37.8	2.7	8.1	5.4
i) Taxpayer dollars are being used wisely to support public education in SISD.	37	2.7	2.7	43.2	24.3	5.4	13.5	8.1
2) Educational Service Delivery								
a) The quality of instruction in my child(ren)'s school is good.	37	2.7	24.3	48.6	13.5	2.7	8.1	
b) The equality of instruction in my child(ren)'s school is better than it was five years ago.	37	2.7	10.8	45.9	16.2	8.1	16.2	
c) My child(ren) is using computers and the Internet at school.	37	2.7	16.2	62.2	8.1	8.1	2.7	
d) Mv	37	2.7	18.9	62.2	5.4	2.7	2.7	5.4

child(ren) feels comfortable using computers and the Internet.								
e) My child(ren) is taught the appropriate subjects at school.	37	2.7	10.8	56.8	21.6	5.4	2.7	
f) Teachers in my child(ren)'s school know the material they teach.	37	2.7	21.6	43.2	21.6	8.1	2.7	
g) Teachers in my child(ren)'s school expect my child(ren) to do his/her very best.	37	2.7	24.3	59.5	8.1	5.4		
h) My child(ren)'s teachers work with me to improve the educational experience of my child.	37	2.7	24.3	40.5	24.3	5.4		2.7
i) SISD does a good job of meeting the educational needs of many different students.	37	5.4	10.8	40.5	32.4	5.4	2.7	2.7
j) SISD students graduate with	37	5.4	13.5	29.7	29.7	5.4	2.7	13.5

the skills they need to prepare them for jobs or more education.								
k) My child(ren)'s school has the materials and supplies it needs.	37	2.7	21.6	37.8	16.2	16.2	2.7	2.7
l) The regular education program at my child(ren)'s school does a good job of educating students.	37	2.7	10.8	62.2	13.5	10.8		
m) The special education program at my child(ren)'s school does a good job of educating students.	37	2.7	10.8	37.8	29.7	2.7		16.2
n) The special education program at my child(ren)'s school identifies the right students to receive services.	37	5.4	2.7	37.8	29.7	2.7		21.6
o) The compensatory education program, which serves at-risk	37	2.7		27.0	32.4	2.7	2.7	32.4

students at my child(ren)'s school, does a good job of educating students.								
p) The vocational education program at my child(ren)'s school does a good job educating	37	2.7		37.8	27.0			32.4
q) The bilingual/ESL program at my child(ren)'s school does a good job educating students.	37	2.7	10.8	29.7	13.5	10.8	2.7	29.7
r) The bilingual/ESL program at my child(ren)'s school does a good job of identifying the right students to receive services.	37	2.7	10.8	21.6	16.2	8.1	5.4	35.1
s) The gifted and talented program at my child(ren)'s school does a good job of educating students.	37	2.7	16.2	40.5	16.2	2.7	2.7	18.9
t) The gifted and talented program at my	37	5.4	13.5	40.5	10.8	10.8	2.7	16.2

child(ren)'s school identifies the right students to receive services.								
u) The district's TAAS scores are keeping up with the state average.	37	2.7	16.2	37.8	24.3		5.4	13.5
v) Year-round schools are effective in educating the district's students.	37	5.4	35.1	43.2	5.4	2.7	2.7	5.4
w) Providing year-round schools saves money for the district.	37	2.7	13.5	24.3	24.3	18.9	2.7	13.5
x) Teachers encourage my child(ren) to have high expectations for themselves after graduation.	37	2.7	24.3	40.5	13.5	13.5		5.4
3) Community Involvement								
a) I am encouraged to be involved at my child(ren)'s school.	37	5.4	18.9	54.1	8.1	13.5		
b) I am involved at my child(ren)'s	37	2.7	16.2	35.1	29.7	13.5		2.7

school.								
c) Many parents are active and involved in my child(ren)'s school.	37	2.7	16.2	40.5	32.4	5.4		2.7
d) I feel welcome at my child(ren)'s school.	37	2.7	18.9	54.1	13.5	10.8		
e) SISD keeps me informed about what is going on in the district.	37	2.7	16.2	51.4	10.8	13.5	2.7	2.7
f) The community is proud of the SISD schools.	37	2.7	18.9	48.6	18.9	8.1		2.7
g) SISD often asks the community for comments and suggestions about the schools.	37	5.4	13.5	29.7	32.4	13.5		5.4
h) The community often provides suggestion and comments to the schools.	37	2.7	10.8	21.6	45.9	10.8	2.7	5.4
i) The district takes advantage of community comments and suggestions.	37	2.7		35.1	37.8	10.8	5.4	8.1

4) Facilities								
a) My child(ren)'s school is clean.	37	2.7	24.3	59.5	10.8	2.7		
b) My child(ren)'s school is well maintained.	37	2.7	24.3	59.5	10.8	2.7		
c) The classes at my child(ren)'s school are small enough so that each student receives individual attention from the teacher.	37	2.7	13.5	45.9	21.6	10.8	2.7	2.7
d) My child(ren)'s school is not overcrowded.	37	2.7	10.8	45.9	21.6	10.8	8.1	
e) The construction programs at SISD are well planned and managed.	37	2.7	13.5	35.1	27.0	13.5	5.4	2.7
f) Attendance boundaries for individual schools are designed appropriately.	37	2.7	13.5	43.2	16.2	5.4	2.7	16.2
g) SISD sets appropriate priorities for facility additions and improvements.	37	2.7	10.8	45.9	21.6	5.4	5.4	8.1

h) SISD facilities are better today than they were five years ago.	37	2.7	18.9	51.4	13.5			13.5
i) SISD has appropriate energy management and conservation programs.	37	2.7	10.8	27.0	32.4	8.1		18.9

5) Financial

a) The district allocates funds fairly among schools.	37	5.4	5.4	21.6	16.2	8.1	5.4	37.8
b) The district allocates funds fairly among educational programs.	37	5.4	2.7	27.0	10.8	8.1	10.8	35.1
c) SISD handles its finances better today the five years ago.	37	5.4		32.4	10.8	8.1	5.4	37.8

6) Transportation (See Bus Report for 6c & 6d)

a) Is you child(ren) eligible for school bus service?	37	8.1	43.2	48.6				
b) If yes, does you child(ren) regularly ride the school bus?	37	45.9	27.0	27.0				
e) The school buses are safe for our	37	32.4	8.1	32.4	8.1	10.8		8.1

children.								
f) The school buses are on time.	37	32.4	2.7	40.5	5.4	8.1		10.8
g) The school buses have minimal breakdowns.	37	35.1	2.7	29.7	13.5	10.8		8.1
h) The school buses adequately serve students in extracurricular activities such as band, choir, and team sports.	37	37.8	10.8	18.9	10.8	10.8	2.7	8.1
i) School bus drivers are dependable.	37	35.1	8.1	32.4	10.8	5.4		8.1
k) SISD bus service is better today than five years ago.	37	35.1	10.8	21.6	8.1	2.7		21.6
7) Food Services								
a) My child(ren) likes the food.	37		8.1	43.2	18.9	16.2	13.5	
b) The cafeteria is clean.	37		13.5	59.5	27.0			
c) My child(ren) eats lunch at the right time.	37		10.8	75.7	8.1	5.4		
d) Food is available at a reasonable	37		16.2	64.9	10.8	2.7	5.4	

cost.								
e) Waiting time in lunch lines is kept to a minimum.	37		5.4	43.2	16.2	16.2	16.2	2.7
f) SISD food service is better today than it was five years ago.	37		8.1	32.4	24.3	8.1	5.4	21.6
8) Safety & Security								
a) My child(ren) is safe in SISD schools.	37	2.7	18.9	43.2	16.2	5.4	8.1	5.4
b) My child(ren) is safe as he/she travels to and from school.	37	5.4	16.2	62.2	5.4	5.4	5.4	
c) SISD schools handle student misbehavior well.	37	18.9		56.8	10.8	5.4	2.7	5.4
d) SISD's anti-drug and anti-violence programs are effective.	37		10.8	40.5	27.0	10.8	5.4	5.4
e) SISD has adequate security personnel to maintain a safe school environment.	37		18.9	43.2	16.2	13.5	5.4	2.7
f) SISD schools are safer today than they were	37		10.8	29.7	18.9	8.1	8.1	24.3

Appendix E - SISD Student Survey

Question	Total	No Response	Strongly Agree	Agree	Neutral	Disagree	Strongly Disagree	No Opinion
1) I like my school.	237	0.8	29.1	42.2	18.6	4.6	2.1	2.5
2) My teacher explains materials and assignments clearly.	237	1.7	16.5	53.2	24.1	3.0	0.8	0.8
3) My teacher cares about how well I do.	237	2.1	24.1	48.9	18.1	2.5	1.3	3.0
4) My teacher gives me individualized attention.	237	2.5	8.9	37.6	31.6	11.8	3.0	4.6
5) My teacher praises me when I do well on my school work.	237		12.2	36.3	35.4	11.0	3.0	2.1
6) My teacher treats me with respect.	237		27.8	54.0	13.5	1.3	0.4	3.0
7) My assistant principal treats me with respect.	237	0.4	16.5	42.6	17.7	3.8	2.1	16.9
8) My principal treats me with respect.	237	0.8	29.5	40.1	11.8	1.7	1.7	14.3
9) I work hard on my school work.	237		20.7	48.1	26.2	2.5	0.8	1.7

10) My parents are active and involved in my school.	237	0.8	16.9	22.4	30.4	15.2	6.8	7.6
11) Year round schooling improves my academic performance.	237	0.4	21.9	39.7	22.8	5.9	3.8	5.5
12) I am challenged by my school work.	237	0.4	16.0	47.3	24.9	5.5	1.7	4.2
13) My school has prepped me for what I plan to do after graduation.	237	0.4	20.3	36.3	23.2	8.9	3.0	8.0
14) My school has provided me with good career and college counseling.	237	1.7	13.1	35.9	24.5	8.9	1.3	14.8
15) My classes have enough books, supplies, and classroom materials for all students.	237		18.6	52.7	16.0	9.3	2.5	0.8
16) My textbooks are available to me on the first day of school.	237		26.6	50.6	10.5	8.0	3.4	0.8

17) The textbooks issued to me are in good condition.	237	0.4	8.4	37.1	27.0	18.1	7.2	1.7
18) I frequently check books out from the library.	237	0.4	11.4	23.6	26.2	19.8	12.7	5.9
19) The library has enough interesting books for all students to check out.	237		19.4	30.8	20.3	11.4	7.2	11.0
20) Computers are available at my school whenever I need them.	237		27.8	44.3	12.2	8.9	1.7	5.1
21) My teachers use computers effectively as part of their instruction.	237		12.2	35.0	25.3	16.9	3.4	7.2
22) I feel comfortable using computers.	237	0.4	31.2	47.3	13.9	5.9		1.3
23) My school is very clean.	237	0.4	29.1	55.3	11.4	3.0		0.8
24) My school is well maintained.	237	0.4	27.8	50.2	16.9	1.7	1.3	1.7
25) I like the food served at	237	0.8	6.8	24.1	25.3	19.0	14.8	9.3

school.								
26) Lunch time is long enough to allow me to buy and eat lunch.	237		4.2	20.7	14.3	22.4	38.0	0.4
27) I feel safe at school.	237	1.7	16.9	48.5	22.4	5.5	2.5	2.5
28) Student misbehavior often interferes with learning in my classes.	237		9.3	24.5	29.5	20.3	11.0	5.5
29) Students who misbehave are treated equally, no matter who they are.	237	1.7	8.4	32.1	22.8	19.0	5.9	10.1
30) I feel safe on the bus.	237	0.4	6.8	20.3	13.9	5.9	3.0	49.8
31) The bus is usually on time.	237		3.4	15.2	10.1	6.8	9.7	54.9

Appendices

Community Comments

This appendix summarizes comments from two community forums held at the Socorro and Montwood high schools on Thursday, October 9, 1997 from 5:00-8:00 PM; numerous one-on-one interviews with area civic and business representatives; and four focus group meetings held with current and former district employees, parents, and community leaders. These comments are presented to illustrate community perceptions of the Socorro Independent School District (SISD) and do not necessarily reflect the findings or opinions of the review team.

Area	Comment
<i>District Organization and Management</i>	
DOM	How many lawsuits does the district have? How much did these cost?
DOM	Why so many meetings?
DOM	There is a lot of pressure on the teachers yet the students can get away with so many things (being disrespectful to teachers; rude).
DOM	Administrators do not support their own personnel.
DOM	Too many administrators.
DOM	I think we need a separate parent, business, community group to oversee expenditures - not just the school board. We have a vested interest.
DOM	Superintendent has an open door policy. Parents are able to speak with superintendent openly about the issues of benches and landscaping around the district's cafeterias.
DOM	PTO meetings are well organized and well attended by parents. The perception of parents is that board meetings are well attended by parents.
DOM	The district does provide bus transportation to board meetings from a central location for parents.
DOM	Concern that the board is micromanaging the administration.
DOM	On the other hand, the board's current attention to detail is better than the old board's lack of attention. The current board's effort is a move in the right direction.
DOM	The board pinches the dollar.
DOM	The past administration spent money too freely. The administration is pulling in the reins.
DOM	The district shares a vision with community college.

DOM	Overall vision exceeds Ysleta and El Paso.
DOM	Board is receptive.
DOM	Site-based decision-making (SBDM) is good and bad. Bad because curriculum is inconsistent across the district.
DOM	SISD never voted on Year Round Education. Ysleta voted on it and voted against it.
DOM	The principals should pay more attention to what is going on in the schools, and less to the board's directions. (translated)
DOM	People should participate and involve themselves more in school planning. For this, we need to participate in the school meetings. (translated)
DOM	Decisions are often made for the benefit of schools north of I-10 and they [the decision makers] forget about the valley.
DOM	SBDM works really well. Over time, people have really gotten used to it and are good at it. Teachers and parents are empowered and have become involved in the decision-making process.
DOM	Schools have the appropriate level of decision-making authority. At one point, the district thought about giving all personnel responsibilities to the schools, but the schools said no - they didn't want it.
DOM	The district took back responsibility for selecting parent/ teacher days - better that this decision is at central office.
DOM	Committees - for the most part, input is considered in decision making.
DOM	Innovative things are happening.
DOM	There is a tendency for districts to keep problems hush, hush.
<i>Educational Service Delivery</i>	
ED	Lower prices on entry fees for extra curricular activities, high entry fees discourage lower income families to attend their sons and daughters games, which in turn lowers morale.
ED	My children enjoy Year Round Education. They get regular breaks (at the right time and when it is needed).
ED	Our class is big. My favorite books are the peewee scouts. My teacher gives us very easy work at school. She is very nice.
ED	My teacher gives us some hard and some easy homework. Also in Art skills to do some puppet shows and we get a 5 if we do it right.
ED	I like Year Round Education. It is beneficial for the students. I think they learn more. (translated)
ED	There are too many tracks in Year Round Education. Do parents really want this?

ED	Counselors should be bilingual. (Others agreed).
ED	The special education program is excellent. (translated)
ED	Yes, we need bilingual counselors, but parents need to learn English so they can communicate with their children and school administrators.
ED	Need to get rid of bilingual teaching. It confuses kids in which language to learn. (Others disagreed).
ED	The special education program was very helpful when we need them. But, parents need to ask for the services!!!
ED	There should be uniforms in all the schools (translated). (Others agreed).
ED	Gifted and talented programs are too easy.
ED	Students who cannot read and write graduate.
ED	Gifted and talented program does not challenge students. They are bored. Teachers don't like to be challenged by students and don't help much with special projects.
ED	A Montwood High School teacher was told by a department head that he/she couldn't fail anybody, so she had to change the student's grade.
ED	Students need more specialty tutoring and labs for math, history, and computers.
ED	Only 7th and 8th graders are included in organized sports. Parents would like to see the inclusion of 6th graders in organized sports.
ED	Dress code is a positive policy, but the district needs to adopt a formal uniform for all district schools.
ED	The concept of combining elementary/middle schools is not ideal. Some parents feel learning should take place in student's own age group.
ED	The district needs to organize more cultural programs and community activities for students.
ED	Some parents are not aware of the accelerated programs offered by the district for their children. One parent said that her child was bored and unchallenged in her math classes, but was unaware of the district's accelerated programs. She also said the math in Mexico was more accelerated than math in SISD and the United States. In Juarez, students learn about square roots in the 3rd grade. She also indicated that other math classes in the same grade are further ahead than her child's class.
ED	The budget for the student orchestra was cut in half.
ED	The district uses a lot of substitutes, and they typically do follow the textbook.
ED	Teachers in math class don't use textbooks, but instead use "prime time" books.
ED	The music program in elementary school is more active than the music program in middle school. While the elementary school music program has already had

	two or three concerts, the middle school music program has not had any concerts. This is a problem at Slider MS.
ED	Teachers are not doing their jobs in music class. Students don't have instruments and just sit and talk in class.
ED	There are too many accelerated programs - MIT, Synergy, GT, Advanced Placement, and Honors. It is difficult for parents to understand how the students relate to each other.
ED	Outstanding job; high test scores; good infrastructure and administration; especially given tax base.
ED	As always, local higher education institutions wish that students were better prepared.
ED	SISD and Horizon City are talking about sharing a library.
ED	O'Shea has great teachers. Always looking for new ways to improve teaching.
ED	O'Shea makes parents feel very welcome.
ED	Great afterschool music program. Started 2 [Omega] years ago. Can learn to play violin, viola, cello, bass, etc. Also allow kids to rent instruments. It is a wonderful program! (at several schools around the district)
ED	Principals at O'Shea, Escontrias Early Childhood, and Helen Ball are great (empowering).
ED	Year Round Education is great. Teachers can use the intercession to catch kids up.
ED	On the down side of Year Round Education, it is hard to run athletic programs; hard for students to participate in various summer programs.
ED	Sanchez doesn't have intercession programs.
ED	Year Round Education makes it hard for students to keep jobs during the summer.
ED	Are Year Round Education schools really cheaper than others? Even with the cost of intercession activities?
ED	Kids don't really get vacation during intercession if they are involved in sports.
ED	Attendance in some tracks is very high (24:1); other tracks are low (12 : 1). Look at attendance of each track.
ED	The principal of one of the schools is intimidated by his staff and will not discipline them. Ex. A geography teacher yelled at the former director of the bilingual program. The principal did nothing and the director left the school. (translated)
ED	When parents request a change in teachers, principals and secretaries pay no attention. (translated)
ED	The students of the alternative school feel discriminated against. with lower

	self- esteem, and with anger. The only help they get is from their parents. They learn nothing. The money for the school is being thrown away. Instead, the money should be spent on discipline classes and for shorter periods of time. (translated)
ED	Special education transition is not smooth. Middle and High schools not involved in earlier ARD's.
ED	Inclusion - support is there, but training is not. 1 day is spent on 504 or special education training, but mostly about forms.
ED	Gifted and Talented students were over identified in earlier grades. Addressing this now.
ED	Some pressure to change grades - especially for athletes.
ED	Grading is inconsistent - some use 1-5, others don't. 1-5 was originally supposed to be for grades 1 and 2. Now, more. Idea was sound, but not well implemented.
ED	Grading inconsistent.
ED	Can't balance tracks as long as all high schools are on the same track.
ED	Could use more help with grants. Region 19 helps some.
ED	The Urban Systemic Initiative program is a valuable service.
ED	Principals spend about 1 day a week in ARD, 504 and LPAC meetings.
ED	Some schools have already started testing of special education students.
ED	Approach to teaching bilingual education varies by school.
<i>Community Involvement</i>	
CI	Parents need to ask about meetings sometimes to show interest. We can't leave it to the school all of the time. When you are interested, you ask!
CI	Some parents at Socorro Middle School feel unwelcome. Some personnel are rude. (others agreed)
CI	School meetings are not open to comments.
CI	School employees at some schools should have training on communication skills. They intimidate parents and make them feel inferior.
CI	I think that it is a good system. Others agree. (translated)
CI	Socorro High School and Socorro Middle School have very good principals that know how to communicate. That's what we need more of.
CI	Superintendent does not do anything about the problems/concerns of parents.
CI	We, as parents, have access to computers so we can keep up with technology. Thank you.
CI	Need parenting classes not just for parents with children with problems.

CI	Good volunteer programs and booster clubs.
CI	Parent and teacher programs are helpful at Clark Elementary/Middle School.
CI	The district does offer night English classes at Helen Ball Elementary School.
CI	There were no translators at school and PTA meetings.
CI	The district has a good volunteer programs, booster clubs, etc.
CI	Parents are having bake sales to raise money for student field trips to Austin and San Antonio to learn more about state history and government.
CI	Parents and teachers are fund raising for trees, landscaping, benches, and the extras.
CI	The Community College works with the district for many programs. * International trade program (start @ 15 and grow into 2 year program. SISD work with college on curriculum) * Distance Learning * Tech Prep Consortium (PIC)
CI	UTEP works with SISD on comprehensive school medical center. Located near Escontrias Elementary. State of the Art. Hold clinic at school. Funded through Kellogg Foundation. SISD provides space. Also funded through UTEP, Texas Tech, Medicaid, and third party providers. There are 3 other locations, but SISD is the best. It is for all families and students. Dental facilities and counseling psychology. Why did this work so well? Because shared vision of board and administrators. Number served has doubled in one year.
CI	UTEP also works with * Outreach * Academic scholarships * Mother/Daughter program for 11 th and 6 th grade moms and daughters. Programs on campus 4 times / year. District commits teachers and buses. Instills value of higher education on girls * Father/Son * Upward Bound
CI	Sometimes citizens feel used. They feel that the district involves them in committees because it has to although the answer is already determined. Ex. Blue Ribbon Committee. Also, Sex Ed textbook selection. The committee was asked to approve the books before they had had a chance to review them.
CI	UTEP buses kids to Texas Tech to show them what a college campus looks like.
CI	Poor communication at Sanchez. Teachers, counselors and staff don't communicate well. Community in Schools offers great programs, but these teachers never tell parents about the programs. Parents don't get progress reports.
CI	Principal at Hilley is negative to parents. Bad for kids to see this.

CI	During a planned orientation night at Sanchez, parents showed up, but teachers and counselors didn't. Also, the principal didn't introduce himself.
CI	Some schools have a program through which individuals who volunteer for at least X number of hours, can borrow a computer for the night. Ex. Escontrias
CI	There is a parent room at Sanchez, but nobody uses it. A volunteer coordinator intimidates people.
CI	At some schools, there is a conflict between PTOs and Vista Volunteers.
CI	The schools should offer English classes to parents in the mornings. (translated)
CI	We wish that Hispanics were better treated and that they were less discriminated against. We would like services - like English classes - in the mornings. We wish that the administration would put the funds where we need them, rather than robbing the money destined for our needs. (translated)
CI	When parents express their opinions at school meetings, the school does not take these into consideration. The school does what it wants.
CI	Some schools pay their volunteer/parent coordinators; at other schools it is a volunteer position. Campestre pays a coordinator out of Title 1 funds. O'Shea has a social worker that is paid and coordinates volunteers.
CI	Socorro MS does home visits. Counts as 2 staff development days each year. Very successful. Other schools are trying this. Vista Del Sol does this for [Omega] of a staff development day. Chavez/ Montwood does it as 1 staff development day.
CI	Campestre asks a parent to host a gathering and to invite about 15 other parents to one home. 2 teachers attend. Do this once a month. Have been doing it for 5 years.
CI	Campestre - Once a month the school has a TRIAD night where parents bring their children to school to do a science project. The school also has reading/math nights where parents and their children come to school together. This is used also to help with TAAS prep. Each attracts about 100 parents and students to the school at each night.
CI	O'Shea has a science and math night.
CI	Campestre - has 16 laptops which it loans out to parents and students (paid for by an AT&T/ SWB grant). The school also has a room for parents.
CI	Socorro HS has parents "all over the place." They get 100 parents at evening events.
CI	Community Education is a great program.
CI	Teachers do a lot and work hard to bring parents into the schools
CI	Pajamarama - over 300 people showed up at Rojas
CI	The urban systemic initiative mentors help to share ideas about parent involvement also

CI	O'Shea - from 9 - 9:30 each morning is reading time at the school. Parents come in and read with their child.
CI	SISD is viewed favorably.
CI	SISD media relations department needs help
CI	Helen Ball and Socorro High School have good public relations.
CI/ED	Slider (and maybe Clark) has a fabulous phone system. It: * Automatically calls parents to tell them what to expect (ex. your child will be bringing home a report card today; parent teacher conferences are next week); * Allows parents to leave voicemails for teachers and all district staff; * Allows parents to call in and hear what is going on in the classroom. Unfortunately, the system is expensive.
CI/HR	At Campestre and Rojas, they try to hire parents of their students.
<i>Human Resources</i>	
HR	Too much nepotism. Others agreed.
HR	Some substitutes have no degrees and the district will not hire those with advanced degrees.
HR	Socorro High. Why 4 vice principals? Why so many administrators?
HR	Too many workshops for teachers to go to during their "break". So they don't really get a vacation.
HR	We need to hire more people who know what the needs of the community are. Not people who are unwilling to become part of the community.
HR	School posted two part time jobs. Interviewed people. Change job at the last minute to one full-time job. Complaint to EEOC one year later. Settled. Could not afford to fight it.
HR	Morale in the district is good. Teachers feel like they are making an impact.
HR	There are waiting lists of teachers who want to work in the district.
HR	There is peer pressure that keeps teachers performing well, but teachers don't sit in fear.
HR	There are good principals that drive the teachers.
HR	Inspired teachers follow inspired administrators.
HR	Teachers have chance to travel.
HR	There is no grouping of in-service training.
HR	Unions are strong in El Paso, but not in SISD.
HR	Year Round Education is hard for teachers. They used to be able to supplement their income with summer jobs. Now they can't.
HR	Coaches get extra pay for extra hours, but it is not enough.

HR	Does teacher staffing reflect how busy their track is?
HR	One assistant principal told two women to report for work on Monday, but in the meantime, the principal hired somebody else. These women felt that they were discriminated against. (translated)
HR	To improve the district, we need better personnel in general. (translated)
HR	Some positions are slow to be filled. Ex. Socorro Middle School and Horizon went for 3 months without a principal. Socorro High School went from July to October without an assistant principal. Campestre is at 3 months and counting with no Assistant Principal.
HR	HR told schools that they had to interview all in-district applicants for principal / assistant principal positions. Some schools interviewed 29 applicants. Very time consuming! Especially when there are 14 people on the interview committee.
HR	Sometimes teachers miss 2 days of class to do these interviews and subs have to be called in.
HR	Teacher approvals are relatively quick.
HR	Principal approvals are pretty slow.
HR	Frustrating that they have to recommend 3 principal choices and the board will select the one the school will get. Some schools have really strong preferences and want one specific individual.
HR	There is a lot of turnover among diagnosticians.
HR	Hiring teachers and para-professionals is fast. Hiring assistant principals is slow. Have to interview all in district applicants.
HR	HR doesn't check all references until school recommends a teacher - the process of checking references, etc. is sometimes slow. Should HR do this earlier in the process? No, there is no need for them to do it for all candidates. Better to wait until a school is ready to hire somebody. Sometimes, schools call on the references to speed up the process. HR accepts the outcome of the schools' calls.
HR	If the assistant superintendent of Personnel is out, approvals are really slow.
HR	Resignations are due late in the process. Timing is ok for most districts, but hard with Year Round Education. The district puts a hold on hiring until all resignations are in.
HR	Terminations? The assistant superintendent of Personnel is very supportive and offers a lot of guidance and help walking through the process.
HR	New teachers are easier to fire, but there are teachers in the district that have not been fired and keep getting passed from school to school. Sometimes they are fine at one school even when there were problems at other schools.
HR	PDAS may be better than previous evaluation methodologies. but it will be

	time consuming. 30 minutes of observation during a class is not enough to complete 1/3 of what is on the PDAS form.
HR	School support do not get paid enough to compensate them for the extra work they do as a result of multi-track.
HR	After a school chose to give up a track, the principal was told that he/she would lose an assistant principal and which principal would be lost. It was not a campus decision.
HR	Don't have money for overtime, so staff take comp time. When they come back from comp leave, they're way behind on workload.
HR	Food service workers, custodians, nurses, secretaries, security guards are all underpaid.
HR	District provides training needed for legal purposes.
<i>Facilities</i>	
FAC	Swimming pool is a waste of money.
FAC	The SISD has a good team of workers and for the most part they do their jobs. But, like everywhere else, there are some lazy employees that need to be replaced.
FAC	The people who open the rooms are prompt.
FAC	Too many janitorial workers doing nothing on school grounds.
FAC	Montwood High School gym is out of commission. Don't have long periods of time in the summer to do needed repairs (Year Round Education). Winter idle months.
FAC	Lockers are not a good idea because, they are used to hide drugs and weapons.
FAC	Some MS and ES share facilities.
FAC	Students at Chavez ES will have music class in the cafeteria next session.
FAC	Chavez ES will have a computer lab (24 computers) for 1st graders.
FAC	The main gym at Montwood HS is out of commission. Because of Year Round Education (Year Round Education), the district does not have sufficient time in the summer for needed repairs.
FAC	Due to changes in attendance boundaries, the district has eliminated some bus routes thus requiring students to cross streets with heavy traffic.
FAC	The district does not provide bus transportation for students who live within two miles of school; however, some of these children have to cross very busy and dangerous intersections.
FAC	The board has handled the growth extremely well. Growth can be dangerous in light of tax rate status quo. Very expensive to play catch up.
FAC	If the district drops the tax rate, it won't have the money for the building fund.

FAC	Everything being built now suffers. The district wants to build a school in 10 - 12 months, rather than the 16 it should take. The district waits until the last minute on building schools.
FAC	Question the tools the district uses to estimate growth and plan.
FAC	The district knows where the next buildings will need to be; it has picked locations. It should start planning.
FAC	Great school building designs.
FAC	Lots of cottages (temporary buildings).
FAC	Awful lot of transient population; attendance areas have changed significantly - boundaries. If water goes into lower valley, that area will grow.
FAC	Big developers know where the population will grow. Need to work with them better.
FAC	New trend is Design Build. SISD should look more closely at this option. Delay is less.
FAC	District needs more help with zoning and utilities. Should look more seriously at gas, and rely less on electricity.
FAC	United ISD receives [Omega] of the necessary land from developers. If growth begins, the district agrees to put a school on the lot. SISD should look into this. Some suggested that the district has already done this.
FAC	Lots of change orders. Used loosely and arbitrarily. Increases costs. Often, district chooses one solution to keep project moving, knowing that they will change it and pay additional amounts for it later. Some are willing to bid on district projects without making a profit, knowing that they will profit from future change orders.
FAC	District needs to look more at natural gas. Higher up front costs, but save money in long run.
FAC	Need oversight of architects and civil engineers.
FAC	Look at abandoned or deferred new projects.
FAC	Dr. Shepak at the Community College used a charette to discuss facility options. SISD should try this.
FAC	The baseball field at Montwood is in poor condition.
FAC	It is easier, cleaner and cheaper to heat with gas.
FAC	Poor use of facilities. They sit open on Saturday and Sunday. Share recreation areas.
FAC	The district is considering (or should consider) hosting big events at its stadium. MACA is a local promoter. Could be a profit center.
FAC	The district should do a better job of studying zonings, utility hook ups, etc.

FAC	The district opens schools too early. As a result, her 6 year old gets buses across town as they await the opening of the new school.
FAC	Some kids go to school each morning at 6:45 to practice sports because one of the gym floors is being repaired.
FAC	Hard to fix facilities when they are always in use during Year Round Education.
FAC	The cleanliness is magnificent. (translated)
FAC	The trash can liners at Robert Rojas are covered with dirt and filth (to the point they say they are unsanitary); the Health Inspector should see it. (translated)
FAC	If it is an emergency, it gets fixed fast (ex. Backed up sink, graffiti). If it is not an emergency, it is really slow (ex. Install hot water heater, 4 [Omega] weeks for a new driveway). On the other hand, it took maintenance weeks to get water into the classroom sinks.
FAC	Work is not coordinated. Ex. The plumber may come do his part of the job, but the electrician may not show up for weeks. Nobody seems to be coordinating their efforts.
FAC	The district could use more electricians, plumbers, carpenters, etc.
FAC	A lot of the level of satisfaction with facilities and maintenance depends on the assistant principal and the head custodian at each school. If they are good, the facilities are better maintained.
FAC	Painting a school rarely goes smoothly. At one school, the painters started, but before they could finish the job, they had to leave to do another project. Poor scheduling.
FAC	Maintenance and facilities workers should wear uniforms so that students, teachers and other staff can know that these people are when they are on campus.
FAC	Maintenance, supplies and contracted services should not come out of the school's budget.
FAC	Sometimes schools run out of janitorial supplies at the end of the year. In the past, the district has been able to help them out - they are afraid that there won't be money for that this year.
FAC	Maintenance is very responsive in cases of emergency - graffiti.
FAC	Contracted services take forever. Ex. Painting takes a long time (one work order has been pending since April) and they don't even do a good job.
FAC	The AC in the O'Shea cafeteria has not worked for 3 years, but finance denies the request for a new one every year (because lack of funding).
FAC	Preventative maintenance is a good program.
FAC	No follow through or coordination when new buildings are opened.

FAC	Board has said no more buildings, and that the district needs to max out current facilities. Principals are afraid of this. They are not happy with multi tracking
FAC	Multi track was meant to be a temporary step until the district caught up with student enrollment growth - it should not be a permanent solution.
FAC	Schools are in pretty good shape.
FAC	Aquatics center was an expensive project, but kids don't have a lot of places to hang out.
<i>Financial Management/Asset and Risk Management</i>	
FIN	Why so many trips to Austin, Washington, Seminars, etc.
FIN	Why are the schools twice the cost of other districts?
FIN	The cost is higher, but the education is better than other districts.
FIN	Was the aquatic center a wise financial investment?
FIN	Property taxes have gone up to \$200 over the last six years. Parents have not noticed any tax decrease last year.
FIN	Parents question whether the aquatic center was a wise financial decision.
FIN	The new board wants to go back to the effective tax rate. There is a political move to satisfy people, not to serve the district, with a drop back in the tax rate. The board needs should follow the Superintendent's advice.
FIN	Previous bond issues were not spent as voted for.
FIN	Neighboring district - Clint - can't pass bond. Needs resources.
FIN	Problem: district starts year in July, but doesn't get money until September.
FIN	Sometimes approving budget amendments is really slow. Other times, it is faster.
FIN	There are rumors that individuals use funds for personal use.
<i>Purchasing</i>	
PUR	The district appears to have plenty of textbooks.
PUR	Has been loose; Have been investigations; No controls; Little monitoring; Could go back to lack of planning and time for planning.
PUR	The district takes a really long time to process purchase orders. PO's seem to get lost once they arrive at Central Office. Staff spend significant time calling to follow up on orders. Much of the teacher conference time is spent tracking PO's. If they leave it alone, it takes a month to get one approved.
PUR	Staff has been told that they are not allowed to "walk" PO's through the process.
PUR	Problem: district starts year in July, but doesn't get books until the state released them in September.

PUR	For 3 weeks, there was no ditto fluid in the district.
PUR	The warehouse can't order until after September.
PUR	3 years ago, the district gave schools \$1000 per year to handle copy expenses. Unfortunately, copy expenses are closer to \$8000 per year.
PUR	Purchase orders are very slow to get approval. Worse since automation.
<i>Computer Technology</i>	
CT	Computers need to be updated from Windows 3.1 to Windows 95
CT	Get rid of MACs and get IBM compatibles.
CT	Allow students to stay after school or before class to work on their class projects.
CT	Teach students to be able to write programs for future jobs.
CT	We need more computers so more children can have more time on them.
CT	District required computer training for teachers - teachers buy on a payment plan, get reduced prices if they go to training.
CT	The district appears to have plenty of computers.
CT	Middle school students at Chavez Elementary / Montwood MS have only one computer in class and do not have access to a computer lab. Elementary students do have access to computers.
CT	Have networking between schools.
CT	Is the district ignoring the 3 R's in exchange for technology?
CT	Teachers have been trained but they need more education training methods using technology. Kids know more about technology than many teachers.
CT	Allows teachers to buy computers.
CT	Financing of technology should change. Obsolete machines vs. leasing machines.
CT	Have Apple II's in some classrooms.
CT	The district wants to have the Internet in all classrooms, but why? No community input to this.
CT	What about setting up labs with dumb terminals. District should consider this.
CT	Would like to open labs for kids to do homework - do this.
CT	There should be more computer classes for the parents in the mornings. For the parents, this would be excellent. (translated)
CT	They should have this service (computer classes) for all the schools. (translated)
CT	Why are they reducing (quitting?) the use of computers in Roias school when

	we need them to teach our children. Are they concerned about the cost of the electricity? (translated)
CT	There should be more computers in all schools. (translated)
CT	Schools use computer lab teachers differently. Some full time in the lab. Others move to classrooms.
CT	Tech support is often slow to get to schools. May take 2 weeks to 6 months. Ex. One teacher was without a floppy for 6 months, he was told the delay was because they couldn't get approval to buy the disk drive.
CT	Teleconferencing. Some of the teachers have used it. It is mostly for teachers, not really for students. The district uses it to bring in conferences. Unfortunately, the equipment is hard to use.
CT	Unclear how many participated in identifying requirements for new system - it seems that many were invited, but not all attended sessions.
CT	The district does not have sufficient resources to fix machines. Understaffed.
CT	Socorro HS has a troubleshooting group.
CT	Computer lab teachers should not be used to fix machines.
CT	There is no master schedule for upgrades. Upgrades will be paid out of the school's budget.
CT	LINKS - some think it is a good program. Others think it is not valuable enough to justify taking teachers out of class. Much LINKS time is spent in classrooms, not with computers
CT/PUR	High schools had input into request for proposal for system to replace Pentamation, but rest of schools did not. Would have liked input in scheduling, for example.
<i>Food Services</i>	
FS	Food is dry and tasteless.
FS	The food should be more appetizing and taste better. (translated)
FS	I wish the food were better (translated)
FS	Good food, but not enough for teachers.
FS	The cafeteria is clean. Thank you. (translated)
FS	The cafeteria is doing excellent work in all areas of service.
FS	They are good food and clean.
FS	The district needs more space outside at Clark Elementary / Middle for students to talk/communicate with each other after lunch and before class.
FS	The cafeteria typically has long lines.
FS	Some students throw their food away, while other students are still hungry.

FS	Food in the cafeteria is pretty good.
FS	Cafeterias feed kids even when they forget their money. They track it so that the student can pay for it later.
FS	Teachers have their own card to pay for food.
FS	Teachers are charged too much for the small portions that they get.
FS	When yellow track is out, the district cuts back on FS staff, and lines get too long.
FS	Lunch is often served at 10:30 or 10:45. For some schools, this is almost the middle of the day (early childhood).
FS	Vending machines are located close to the cafeterias. Some teachers are disturbed that kids can buy candy and sodas, etc.
<i>Transportation</i>	
TR	There are no buses from the Vinedo acres to Socorro Middle and the path is so dangerous, students have to cross the canal.
TR	We have very good transportation. Especially the after school transportation for students who participate in programs after school. Thank you.
TR	Good Idea: "Activity Buses" at Montwood High School. 1 early morning. 1 late afternoon. To transport students for extracurricular activities.
TR	Bus transportation is too limited. Without bus transportation within a two mile radius, student have to cross some very busy and dangerous intersections.
TR	"Activity Buses" at Montwood HS are a good idea for transporting students for extracurricular activities. The buses run once in the early morning and once in late afternoon.
TR	Students have to walk too far (within a two mile radius of school) in the heat and cold, and the district needs more bus routes.
TR	The district does not provide curbside bus service for parents to school organizations. Many families have only one mode of transportation. Parents would like enhanced transportation services.
TR	Buses all over the place. Due to lack of campuses in some locations.
TR	Horizon City has elementary school, but no middle or high school. Bus 7 - 10 miles (long way for an urban area).
TR	Hueco, Hilley, Sanchez all have dangerous routes to school - by train track, busy intersection, How many crossing guards?
TR	Very good. Ex. One school was going on a field trip, when one driver called in sick, Transportation got another driver there really quickly.
TR	Bus drivers should wear uniforms. Can't always identify bus drivers. They wear a tag, but a uniform would be better.

TR	Routes for some special education students may start as early as 4:30 or 5 in the morning.
TR	Does a very good job waiting for students and making sure everybody is there.
TR	District has made exceptions and is providing bus service from areas within 2 miles of the school.
TR	Transportation is very responsive.
<i>Safety and Security</i>	
SS	Why are the security costs twice the state average? (El Paso Times - 10/08/97)
SS	SISD should consider brining drug-sniffing dogs on to the high school campuses (written by a high school teacher).
SS	As a student. I feel very safe and secure.
SS	Need change of security service? Need to hold security accountable?
SS	No more abuse from the security guards and harassment. Out with the security "corrupts".
SS	Teach parents of alternative education students how to deal with problems at home.
SS	Security is good.
SS	Why are the security guards not on the school grounds? They spend all day 'joy riding' around in the vehicles.
SS	The security department needs more radios (and radios that work), more vehicles and better management.
SS	Too many gangs.
SS	Gangs exist due to discrimination and no respect.
SS	The safety and security is good.
SS	We as parents need to stop accepting gangs as a part of our children's lives. We need more activities to keep our children busy.
SS	The district is not consistent with discipline. At some schools, security guards bring students to principal and the student gets sent to the alternative school. At other schools, the principals just lets the student go (and more or less tells the security guard not to worry about it).
SS	Good Idea: Parent volunteers should patrol high schools. They know the kids.
SS	Although there is gang activity, the gang problem at Clark Elementary / Middle is exaggerated.
SS	The district now has a dress code in MS: no earrings, untucked shirts, or colored hair. The district should implement this policy in HS.
SS	The district has a very high teen pregnancy rate.

SS	Parent volunteers wear vests and patrol HS. They know the kids. These patrols are a good idea.
SS	School resource office (SRO) - have 2 certified police officers on 2 campuses. Paid for by grant from Texas Department of Criminal Justice.
SS	The security guards should be put to work and should not ride around in their cars. They don't even know how to change a tire. (translated)
SS	Feel very safe on campus.
SS	Gangs are not a problem.
SS	Most, if not all, schools have dress codes. Clarke had a uniform, but the kids didn't like it, so they changed it.
SS	There is a shortage of security guards. Clarke has one from 3-7 pm; Montwood MS (?) and Slider don't have any guards.
SS	When elementary schools call for a security guard, it takes a long time for one to get to the school.
SS	Some schools are supposed to have 24 hour security guard coverage, but the 11pm to 7am shift may not always show up.
SS	Full time guards are generally good. Part time ones are not generally as good.
SS	There is high turnover in security guards - they are not paid well and are looking to join the El Paso Police Department or the Sheriff's Department
SS	Can no longer call security guards to open buildings on Saturdays.
SS	El Paso police have people on campus, but since the schools are paying half of the salary, they would like to be able to tell the guards what they expect them to do.
SS	Security guard's boss is security, not the principal.
SS	The principals like having licensed officers around.
SS	KEYS does not serve as a deterrent. Some students want to go there.
SS	Principals and teachers like KEYS because it gets these students off of their campuses. Some would like to see a similar program for elementary schools.
SS	The positive impact of Keys depends on the students - if they want to learn, they will. If they want to improve their behavior, they will.
SS	Q. Response to a student assaulting another student? A. It depends on the student's track record.
SS	There is some perception that there is a gang problem in the lower valley.
SS/CI	Some schools are open to midnight (custodians will let teachers in). This keeps vandalism low.
SS/CI	To develop good relations with two gangs, the principal at Campestre lets the gangs play basketball in the gym after school.

Appendices

Proposed Capital Improvement 1997-98

Americas High School	Punch list incomplete to be done by contractor
Montwood High School	Electrical upgrade studies Fire alarm upgrade EMS replacement (Energy Management System) Metal roof repairs Skylight repairs Yard meter for ball fields
Socorro High School	Roof top heating units on building B need to be replaced. Fire alarm needs to be completed as it's partially done. Re-roof building B, administration area, 5,000 wing Install three (3) air washers 5,000 wing Electrical upgrade throughout campus Need to work on ADA compliance Upgrade flood irrigation ditch Hook to sewer system
Walter Clarke Middle	Exhaust fans for electrical rooms
Sanchez Middle	Electrical upgrade for science labs Exhaust system on science labs Waterproof exterior cinder block Connect to sewer system
William Slider Middle	Electrical upgrade for science labs Exhaust system on science labs Water proof exterior walls Problems with tile in entire school Need new irrigation meter for football field
Socorro Middle	Electrical upgrade for science labs Upgrade exhaust system on science labs Water proof exterior block Automate sprinkler system Upgrade flood irrigation ditch Connect to sewer system
Ball Elementary	Water proof cinder block Automate sprinklers
Campestre Elementary	Replacement of 6 roof jacks Landscaping Playground upgrade

	Connect sewer line
Myrtle Cooper Elementary	Make up air units in kitchen and locker area Roof replacement Automate sprinklers ADA compliance
Education Center	Fresh air units ADA compliance
Escontrias Pre-School	ADA compliance work Replacement of four (4) heaters Add one (1) air conditioner unit Connect sewer line Upgrade playground Repave sections between buildings
Escontrias Elementary	Replace make up air units Roof repairs Connect sewer line
Hilley Elementary	ADA compliance Sand box for playground Connect sewer line
Horizon Elementary	Make up air unit in kitchen ADA compliance Automatic sprinkler
Hueco Elementary	Repair make up air units Connect sewer line Construct sand box ADA compliance
KEYS Academy	Electrical upgrade for vocational classes use is needed
O'Shea Elementary	Make up air units for kitchen and locker area Replace air washers Xeriscape ADA compliance
Robert Rojas Elementary	Roof replacement Roof drain replacement Replace make up air unit Yard meter installation Water proof exterior walls
Student Activities Center	Refrigeration units for press box Re-roof press box Re-roof locker rooms
Transportation	Electrical upgrade Sewer hook up ADA compliance

Vista del Sol Elementary	Replace make up air units in kitchen ADA compliance Structural problems Xeriscape Automate sprinklers Upgrade playground and sand box
Sierra Vista Elementary	N/A

Source: Department of Support Services, SISD