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December 14, 2004

Dr. Nabor Cortez
Superintendent, South San Antonio Independent School District

Dear Dr. Cortez:

The attached report reviews the management and performance of the South San Antonio Independent School District's (SSAISD's) educational, financial, and operational functions.

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

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

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

Respectfully submitted,

John O'Brien
Deputy Director
Legislative Budget Board

cc: David E. Carreon
       Manuel R. Lopez
       Jaime A. Gallegos
       Homer Flores
       Trinidad T. Mata
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EXECUTIVE SUMMARY

SOUTH SAN ANTONIO INDEPENDENT SCHOOL DISTRICT MANAGEMENT AND PERFORMANCE REVIEW

The South San Antonio Independent School District (SSAISD) serves a largely economically disadvantaged and minority student population located close to KellyUSA in the south side of San Antonio. The district's students scored below state averages in all areas on the Texas Assessment of Knowledge and Skills (TAKS) in 2002–03, while district dropout rates were higher and attendance rates were lower than those of the state. The district has a history of board governance troubles including intervention from the Texas Education Agency and an inability to cooperatively work as a collective whole and with the superintendent.

SSAISD's school review report identifies 20 commendable practices and makes 81 recommendations for improvement. The following is an Executive Summary of the significant accomplishments and findings that resulted from the review. A copy of the full report can be found at www.lbb.state.tx.us.

SIGNIFICANT ACCOMPLISHMENTS

- SSAISD identifies and recruits migrant students through a comprehensive process using a variety of media.

- SSAISD implemented an innovative program to reduce classroom disruptions and help elementary school students learn and practice appropriate classroom behavior.

- SSAISD's participation in the textbook credit pilot project has allowed the district to obtain additional textbooks with existing book credits.

- SSAISD uses a unique program, South Sansational Awards, to promote and celebrate elementary student success and promote the transition to middle school.

- SSAISD uses advisory committees to solicit community input and involve the community in district decision-making.

- SSAISD's Purchasing Department cost-effectively manages its bid openings to use a single, consolidated advertisement rather than multiple advertisements while complying with all state regulations.

- SSAISD's implementation of its coordinated health program emphasizes student service and learning to improve overall student and community health.

SIGNIFICANT FINDINGS

EDUCATIONAL PROGRAM REVIEW

- The district does not evaluate all instructional programs to ensure these programs meet district goals and objectives, support improvements in student performance, and are cost-effective.

- SSAISD does not have a defined curriculum for many secondary courses, and secondary student performance is significantly below regional and state averages on statewide, college entrance, and advanced course exams.

GOVERNANCE AND ADMINISTRATIVE ROLES

- The SSAISD board fails to provide appropriate leadership for the district, limiting the ability of the superintendent and staff to accomplish district goals and objectives.

- The current board structure does not provide school district constituents with at-large districtwide school board representation.

- The district does not have a comprehensive contract list, centrally located contract files, or a consistent contract monitoring process with accountability methods to document performance problems or issues of contract non-compliance.

- The Purchasing Department does not directly participate in all aspects of the process to procure professional services.

- The current central organization structure does not address all of the instructional, management, operational, and evaluative needs of SSAISD. The superintendent has 18 direct reports, including all principals and directors, and the instructional delivery reporting structure is fragmented.

- Campus staffing at the middle and high schools exceed industry standards for campus clerical staff.

OPERATIONAL EFFICIENCIES

- SSAISD's Plant Operations management does not adequately plan, budget, or supervise maintenance and custodial activities to ensure clean, well-maintained facilities.

- The district does not have an effective and coordinated energy management program to reduce expenditures that includes energy management goals, related strategies, and subsequent monitoring of utility costs.

- The Technology Department does not have sufficient staffing to address all areas of responsibility or provide backup in key areas.

- SSAISD does not have a process to ensure compliance with federally mandated guidelines for food service fund balances.

SIGNIFICANT RECOMMENDATIONS
EDUCATIONAL PROGRAM REVIEW

- **Recommendation 1: Design and implement a districtwide instructional program review based on the state's accountability measures and including administrative oversight.** The district should immediately develop a schedule and design to review all instructional programs using the state's accountability factors as a foundation. By instituting a regular review of all programs based upon the state's accountability criteria and by assigning specific administrative oversight, the district should be able to quickly determine program effectiveness, make necessary adjustments, and increase overall student performance.

- **Recommendation 2: Purchase and/or develop curriculum guides for all subject areas and courses offered.** The guide format currently in use in the district should be modified for use in the development of new guides and to make existing guides course-specific. Curriculum guides should help ensure that students are taught uniformly through the district, that instruction between grade levels are integrated horizontally and vertically, and that the material used for instruction includes state minimums and addresses local needs.

GOVERNANCE AND ADMINISTRATIVE ROLES

- **Recommendation 8: Assign a Texas Education Agency (TEA) board governance conservator and strengthen existing Code of Ethics policy to limit board involvement in daily operations.** Because significant action is needed to change the pattern of board behavior and community and staff perceptions about its actions, TEA should assign a governance conservator to be available to oversee districtwide governance and preside over monthly board meetings. The board should also adopt detailed language to the existing Code of Ethics limiting both collective and individual board involvement in districtwide daily operations and regularly self-monitor adherence to all aspects of new and existing board policies. By enacting these significant changes, the SSAISD board should provide appropriate leadership for and engage in appropriate interactions with district administrators, staff, students, and community members.

- **Recommendation 9: Reconstitute the board by creating two at-large positions and five single-member districts.** The board should alter its makeup to include two at-large positions promoting both districtwide and single-district board representation and providing voters with the opportunity to elect three board members— two at-large and one single-member district. Changing to this type of board composition, similar to 56 other school districts in Texas, may help SSAISD's board members break the long-standing oppositional mindset, encourage more candidates to run for election, and facilitate a greater voter turnout.

- **Recommendation 14: Implement a districtwide contract monitoring process managed by the Purchasing Department.** The district should implement a consistent contract monitoring process managed by the Purchasing Department to allow the district to better define, monitor, and evaluate vendor and contractor performance, while reducing reliance upon fragmented departmental contract oversight. By immediately transferring all contract files to the Purchasing Department, developing a comprehensive list, and including performance measures in new and renegotiated contracts, the district should ensure districtwide contract compliance, maintain copies of all legal documents, and centralize responses to outside requests for contract information.

- **Recommendation 15: Require Purchasing Department participation for all procured and contracted services and establish, document, and implement consistent procurement processes districtwide.** SSAISD should require Purchasing Department participation for procured and contracted services. By including the appropriate purchasing staff in all purchasing evaluations as directed by board policy, the district mitigates the risk of perceived or real contracting irregularities and ensures that appropriate staff provide valuable technical assistance or input during evaluations and subsequent contract negotiations.

- **Recommendation 24: Modify the organization to group like functions, reduce the span of control for the superintendent, and provide coverage for needed central functions.** Through an organizational restructuring that includes a logical grouping of similar functions under a single administrator and reducing the number of direct reports to the superintendent, the district should improve both districtwide and departmental direction and accountability and maintain a balance of responsibilities among senior staff.

- **Recommendation 25: Implement enrollment-based staffing formulas for clerical staff at schools.** By implementing staffing formulas based upon the Southern Association of Colleges and Schools (SACS) minimum standards the district should reduce unnecessary clerical positions districtwide and realize savings from the elimination of excess positions.

OPERATIONAL EFFICIENCIES

- **Recommendation 31: Outsource the management of maintenance and custodial functions.** The administrator for School Support Services should develop a comprehensive statement of work that adequately describes the district's maintenance and custodial needs and the expected time frame for achievement prior to issuing a request for proposal in conjunction with the director of Purchasing. By outsourcing the management of maintenance and custodial functions the district should realize efficiencies in both staff and managerial activities.

- **Recommendation 35: Hire an energy manager to develop and implement an effective energy management program supported by board-adopted policy.** A qualified energy manager should be able to implement and coordinate a districtwide energy management program that is based upon continually monitoring utility expenses, providing user education to reduce energy consumption, and retrofitting old equipment as funds become available. This program should include summer energy conservation efforts. The board should also adopt energy management policy that provides guidance for the overall program along with specific goals.

- **Recommendation 46: Hire software and Web development specialists.** By hiring software and Web development specialists the

district should ensure all hardware and software purchases are compatible with existing systems, provide necessary software training and continued support, update and maintain the district's website, and promote increased districtwide efforts to implement computerized administrative systems and instructional integration efforts.

- **Recommendation 72: Implement a process to prevent excess fund balance for the Food Services Department.** By modifying the department's existing profit and loss model to add the capability to project revenue and expenditure requirements and include the effect on ending fund balance, the district should mitigate any future risk of excessive fund balances. In addition, the district should also identify projected uses of fund balance and submit them as a plan to the board during the annual budget process to allow pre-approved expenditures of Food Services Department fund balance once thresholds are reached.

GENERAL INFORMATION ABOUT SSAISD

- Rated *Academically Acceptable* by the Texas Education Agency (TEA) for 2004.

- According to state-released results, 78 percent of SSAISD's students met the 2003–04 passing criteria for reading, 92 percent for writing, 86 percent for social studies, 62 percent for mathematics, and 59 percent in science. Regional Education Service Center XX's (Region 20) students scored 84 percent in reading, 90 percent in writing, 90 percent in social studies, 74 percent for mathematics, and 72 percent in science. The state's students as a whole achieved, 85 percent in reading, 91 percent in writing, 91 percent for social studies, 76 percent for mathematics, and 72 percent in science.

- The certified tax value for SSAISD in 2003 was nearly $782 million; the district's property value per student was approximately $78,800.

- Enrollment remains relatively stable near 10,000 since 1999.

- SSAISD had a 2003–04 operating budget in excess of $77.5 million.

SCHOOLS

- 17 total schools including 11 elementary (one newly opened in August 2004), three middle, two high schools, and one district alternative school

2003–04 STUDENT DATA

- 9,928 total students

- 95.3 percent Hispanic

- 2.9 percent White

- 1.5 percent African American

- 0.3 percent Asian/Pacific or Native American

- 89.9 percent economically disadvantaged compared to 52.8 percent for the state.

2002–03 AUDITED FINANCIAL DATA

- Total expenditures of $64.1 million

- Fund balance of nearly $21.2 million or 30.2 percent of total expenditures

- 1,361.7 total staff, 672.0 of which are teachers

- 2003 Total Tax Rate $1.72: $1.50 Maintenance & Operations, $0.22 Interest and Sinking Fund

2002–03 PERCENT SPENT ON INSTRUCTION

- When compared to total annual expenditures SSAISD spent 50.4 percent on instruction equal to the state average; when examining this amount with total annual operating expenditures the district spent 57.3 percent on instruction, above the state average of 56.6 percent.

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

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

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

The following table summarizes the fiscal impact of all 81 recommendations contained in the report. Note that the fiscal impact for both the General Fund and the Child Nutrition Fund are provided.

FISCAL IMPACT
GENERAL FUND

	2004–05	2005–06	2006–07	2007–08	2008–09	TOTAL FIVE-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
Gross Savings	$202,386	$484,436	$536,235	$586,034	$639,833	$2,448,924	$0
Gross Costs	($237,391)	($472,960)	($537,888)	($547,614)	($557,340)	($2,353,193)	($692,392)
Total	($35,005)	$11,476	($1,653)	$38,420	$82,493	$95,731	($692,392)

The following costs can be paid from the district's existing Child Nutrition Fund Balance.

FISCAL IMPACT
CHILD NUTRITION FUND

	2004–05	2005–06	2006–07	2007–08	2008–09	TOTAL FIVE-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
Gross Savings	$17,291	$17,291	$17,291	$17,291	$17,291	$86,455	$0
Gross Costs	($126,861)	($126,861)	($126,861)	($126,861)	($126,861)	($634,305)	$0
Total	($109,570)	($109,570)	($109,570)	($109,570)	($109,570)	($547,850)	$0

SSAISD is located in southwest San Antonio and served 9,928 students, 90 percent of which were classified as economically disadvantaged, in 17 schools in 2003–04. Students are predominantly Hispanic, comprising 95 percent of the total student enrollment in 2003–04. Principals report directly to the superintendent, and the associate superintendent for Curriculum and Instruction provides leadership for the district's instructional program. On September 30, 2004, the district received an overall Academically Acceptable rating from the Texas Education Agency (TEA). Four schools received a Recognized rating and 11 schools received an Academically Acceptable rating. One school, South San Antonio High School, also failed to meet federal No Child Left Behind (NCLB) Adequate Yearly Progress requirements for the second year in a row requiring the district to give parents the option of student transfer to South San Antonio West High School with district-guaranteed transportation. The district's alternative schools, as well as those statewide, will not receive ratings under the state's new accountability rating system until 2005.

ACCOMPLISHMENTS

- SSAISD uses a variety of media sources to improve identification and recruitment of migrant students.

- SSAISD uses visiting teachers to help improve attendance rates, reduce truancy rates, and as a measure of student and parent accountability.

- SSAISD provides a flexible alternative education program where seriously at-risk students can earn a high school diploma.

- SSAISD has a comprehensive follow-up system for tracking leavers to ensure dropout data integrity.

- SSAISD prioritizes adult literacy programs through an Extended Hours Library Program.

FINDINGS

- The district does not evaluate all instructional programs to ensure that these programs meet district goals and objectives, support improvements in student performance, and are cost-effective.

- SSAISD does not have a defined curriculum for all subjects and grade levels particularly for many secondary courses.

- SSAISD does not follow pre-referral procedures in the identification of Limited English

proficiency (LEP) students as special education students.

- SSAISD's bilingual/English as a Second Language program does not have enough endorsed teachers and has not been proactive in making parents aware of the benefits of the bilingual/ESL program.

- The district does not consistently use enrollment trends or consider community and business needs when making decisions regarding Career And Technology Education courses, particularly those related to Technology Preparation.

- SSAISD's library program does not meet *acceptable, recognized,* or higher state guidelines for the number of books available to students.

- SSAISD's libraries do not meet *acceptable* or higher staffing standards as defined by the Texas State Library and Archives Commission.

RECOMMENDATIONS

- **Recommendation 1 (p. 9): Design and implement a districtwide instructional program review based on the state's accountability measures and including administrative oversight.** The district should immediately develop a schedule and design to review all instructional programs—regular, special education, bilingual education, dropout prevention, and career and technology education—using the state's accountability factors as a foundation. By instituting a regular review of all programs based upon the state's accountability criteria and by assigning specific administrative oversight, the district should be able to quickly determine program effectiveness, make necessary adjustments, and increase overall student performance and graduation rates.

- **Recommendation 2 (p. 13): Purchase and/or develop curriculum guides for all subject areas and courses offered.** The guide format currently in use in the district should be modified for use in the development of new guides and to make existing guides course-specific. Curriculum guides for all courses should provide parents, staff, administrators, and community members with a measure of accountability to ensure that students are taught uniformly districtwide, instruction between grade levels is integrated horizontally and vertically, and the locally adopted written

materials used for instruction include state minimums as well as address local needs.

- **Recommendation 3 (p. 15): Follow pre-referral procedures, provide staff development, and monitor referrals of Limited English Proficiency students as special education students.** The Special Education Department should monitor the implementation of the pre-referral process involving such students to ensure that they are not referred to special education before they have had three years of bilingual education or are proficient in English, to ensure that their difficulties are caused by disability rather than by language. Following the district pre-referral process will reduce inappropriate referrals to special education.

- **Recommendation 4 (p. 16): Evaluate current Career And Technology Education (CATE) courses and restructure offerings using an advisory panel.** To accomplish the needed review and restructuring of Career and Technology Education (CATE) courses, the district should form an advisory committee composed of key administrators in the Curriculum Department, principals, counselors, teachers, and members of the business community. Restructuring CATE course offerings based upon enrollment trends and community and business need should cost-effectively provide students in CATE programs with appropriate training to match identified needs in the community.

- **Recommendation 5 (p. 19): Increase the number of teachers with English as a Second Language (ESL) endorsements and modify the ESL program to include a parent information and student improvement plan.** SSAISD should implement an annual program to increase the number of district teachers with an English as a Second Language (ESL) endorsement particularly at the secondary level. In addition, the district should use professional expertise to assist a team of teachers to review and modify the entire program based on identified strengths and weaknesses. By annually increasing the district's available pool of teachers with an ESL endorsement and by modifying the ESL program, the district should be able to more effectively provide services to increase future student performance and academic success.

- **Recommendation 6 (p. 23): Improve school library collections to meet the state *recognized* standard.** The district should

immediately purchase books to more equitably stock campus library collections districtwide. By bringing all of the district's library collections to *recognized* standards according to the Texas State Library and Archives Commission (TSLAC), SSAISD should provide all students equal access to materials needed to further their education.

- **Recommendation 7 (p. 26): Hire additional librarians to fully staff campus libraries to meet the state *acceptable* standard.** SSAISD is understaffed with certified librarians and overstaffed with library clerks according to the TSLAC *acceptable* standards. The district should hire 1.5 additional full-time librarians. As a result of their specialized training, librarians support instruction in the Texas Essential Knowledge and Skills (TEKS) and help students to become accomplished readers, independent learners, critical thinkers, creative problem solvers, and informed citizens.

DETAILED ACCOMPLISHMENTS

MIGRANT STUDENT IDENTIFICATION AND RECRUITMENT

SSAISD uses a comprehensive publicity process to identify and recruit migrant students. The district distributes an employment survey at registration to identify migrant families. The survey is available in English and Spanish and asks parents whether they have traveled or moved in the last three years to look for or do temporary or seasonal agricultural work. In 2003–04, the district incorporated graphics representing the different occupational areas to make it easier for parents with limited reading and English skills to complete the survey. The district encourages children to give the survey to their parents. The Migrant Program reviews the responses and contacts parents who answered in the affirmative. Migrant Program staff visits homes without telephones to verify the information. In homes where no one was available during such visits, the staff leaves door hangers with information about the program.

The migrant office publicizes the program districtwide by placing posters in schools, stores, laundromats, restaurants, bakeries, doctor offices, pharmacies, churches, migrant housing, and gas stations. The district also uses billboards in English and Spanish. The billboards inform migrant agricultural families about available services and benefits and provide a telephone number they can call. The district distributes flyers encouraging migrant agricultural workers to ask about migrant benefits at the nearest school. As a result of SSAISD's identification and recruitment efforts, more migrant families self-identify or call to report their arrival. Families show a better understanding of

available services and request them. This helps the district identify migrant children earlier and sooner. The process and strategies the Migrant Program has used to identify and recruit migrant students received local, regional, and national attention. Migrant Program staff gave presentations at Regional Education Service Center XX (Region 20) meetings and at the National Migrant Education Conference and helped other districts with the migrant family survey.

VISITING TEACHERS

SSAISD uses visiting teachers to effectively address student truancy, enhance attendance rates, and to provide parent liaison services. The truancy team consists of three visiting teachers and two clerks. The visiting teachers do not have classroom responsibilities, but visit students and parents in their home. Visiting teachers provide a variety of services designed to keep students in school based upon individual family and student needs. If a student's attendance is affected by family needs, visiting teachers connect the family with community assistance. Visiting teachers provide referrals to social service providers, counsel students about the importance of attendance, and refer students to specialized alternative learning programs if appropriate.

Exhibit 1-1 compares the attendance rate for SSAISD to the attendance rates of its peers.

The SSAISD attendance rate is higher than the rate for the urban peer districts. The SSAISD student population is highly mobile, making attendance and truancy programs an important part of the educational strategy.

Truancy is a gateway to criminal behavior and education is the best crime-fighting tool. The Texas Dyslexia Foundation studied juvenile offenders in state detention facilities, finding that those who completed a general equivalency diploma (GED) program were 70 percent less likely to return to juvenile detention. Attendance is the first step to successfully finishing school.

Truancy duties for visiting teachers include confirming student addresses, holding parent conferences, filing misdemeanor charges against truant students and parents, and testifying in court. Some Texas school districts use law enforcement officers to make truancy home visits. SSAISD uses visiting teachers because some parents do not respond positively to law enforcement. As revealed in focus groups, parents will often speak with a teacher when they will not open the door to a police officer. SSAISD administrators supported the use of visiting teachers as a positive enhancement of overall attendance.

ALTERNATIVE HIGH SCHOOL PROGRAMS

The SSAISD Completion Program provides students identified at risk of dropping out of school with a self-paced course of study that results in high school graduation. The district provides several alternatives to keep students in school. SSAISD recognized a need to provide additional assistance to students who were not appropriate for other alternative education programs.

The district has an alternative school for students with disciplinary challenges and another alternative school known as the Academy. The Academy provides an alternative educational setting for students who do not thrive in a traditional classroom. While some disciplinary students are accepted into the Academy program, the Academy program is not designed to address that particular student population. The district also provides a program that allows students to earn a general equivalency diploma.

In 2001–02, SSAISD initiated a program for students in need of an alternative and non-traditional learning environment called the Completion Program. This program is available for students who are at high risk of dropping out of school including those who have experienced problems with truancy. School counselors refer students in grades ten through twelve to the Completion Program. Approximately 15 to 20 students attend at any one time.

EXHIBIT 1-1
ATTENDANCE RATES FOR SSAISD AND PEER DISTRICTS
1999–2003

DISTRICT	1999–2000	2000–01	2001–02	2002–03
Harlandale ISD	94.8	94.3	95.5	95.3
Edgewood ISD	93.9	93.4	95.2	94.8
South San Antonio ISD	**95.5**	**95.3**	**95.8**	**95.4**
Roma ISD	96.1	96.3	96.1	95.9
Mercedes ISD	96.5	96.1	96.1	96.0
State	95.3	95.4	95.6	95.5

SOURCE: Texas Education Agency, Public Education Information Management System (PEIMS), 1999–2000through 2002–03.

The program is self-paced, and uses a computer-based program called Nova Net to provide educational credits. The Completion Program differs from the GED program. A GED is equivalent to a high school diploma, but signals that the student did not complete courses through the traditional high school. Successful Completion Program students graduate from high school. They receive a diploma and attend the high school graduation ceremony. In 2003–04, 21 students graduated from the Completion Program. Although not reaching full graduation rates, district and campus administrators credit the alternative programs with providing opportunities for students identified at-risk to successfully complete high school and equivalent course work.

STUDENT TRACKING

SSAISD has a comprehensive follow-up system for tracking students leaving the district. The SSAISD follow-up program for tracking student leavers has been recognized for its accuracy and comprehensiveness. Region 20 Public Education Information Management System (PEIMS) staff complimented the accuracy of the SSAISD leaver audit. The SSAISD administrator was invited to present the program at the Midwinter Conference for School Administrators in 2003.

The program was initially developed in 1980 by a team of three counselors and a visiting teacher. It went through several revisions to ensure that it meets or exceeds state mandates for accurate leaver accounting. The program's designated staff on each campus is responsible for tracking and documenting leavers. Campus staff includes the principal, assistant principal, counselor, visiting teacher, registrar and data processor. The program requires these staff to be thoroughly familiar with PEIMS data standards related to the leaver documentation process. At the district level, the Counseling Department is responsible for receiving, handling and storing all tracking materials. Counseling Department staff verifies all information provided by the student and parent. District personnel gather additional information from outside sources including other districts, police reports to check if a student is incarcerated, probation officers and the Internet. They also use the New Generation System to track migrant students. Counseling Department staff reviews records for each withdrawn student in grades 7–12 to determine if documentation is sufficient to support the student's leaver status. If materials are not sufficient, both district and campus staff conducts more research.

The program has detailed procedures and forms for recording information on leavers and graduates. The program differentiates among students who withdraw during the school year, those who quit attending school, students who fail to return at the beginning of the next year and students who return but were not enrolled on the snapshot date. The program has detailed procedures and forms specific to each group of leavers and includes leaver-monitoring procedures. District and campus staff monitors student leavers on a continuous basis until there is acceptable documentation about the status of these students. If the Counseling Department does not receive a records request from another district or school, the department contacts by fax other agencies or districts to determine actual enrollment. The Counseling Department submits reports every quarter to principals on students whose leaver status is undetermined so that continual attempts may be made to recover these students to an educational setting. The program also involves a step-by-step process, including edits and quality assurance reports for documenting accurately all leavers. SSAISD has been successful in identifying and documenting the reasons for leaving the district for 99.1 percent of the leavers in 2003–04.

LIBRARY EXTENDED HOURS AND ADULT LITERACY PROGRAMS

The Athens Elementary library has implemented an Extended Hours Program for parents and community members. Initiated in February 2004, the library is available from 3:00 PM–6:00 PM to assist parents who want to help their children with homework assignments and special projects or who require library resources for self-improvement purposes.

The goal is to provide a learning zone for students and parents during hours more convenient to parents to support improved literacy in the community, provide opportunities for self-improvement, and increase the use of campus resources. For parents involved in continuing education, help is available as they use print materials and computers for research. Students are also encouraged to come with their parents and use library computers for Accelerated Reader (AR) testing or researching topics on the Internet.

Special print resources have been added to other adult materials in the library in the areas of elementary education methods, parenting, and self-improvement. Available books include "how-to" manuals, resume preparation and job search materials, fiction, maps, study methods, and computer program manuals. Some Spanish and bilingual titles are provided. Computers are available for Internet browsing, resume preparation, job

searches, and schoolwork. A library clerk assists with the use of any library resources.

DETAILED FINDINGS

PROGRAM EVALUATION AND STUDENT PERFORMANCE (REC. 1)

The district does not evaluate all instructional programs to ensure that these programs meet district goals and objectives, support improvements in student performance, and are cost-effective. In addition, program oversight is fragmented and current review of some programs is not conducted in enough detail to provide administrators with the necessary data to determine whether or not programs are working. SSAISD does not consistently monitor curriculum presentations associated with these programs as well.

As with all districts, the Texas Assessment of Knowledge and Skills (TAKS) is used to assess student progress on the statewide curriculum guidelines, the TEKS. TAKS is administered at the local level, scored externally under contract to the state, and returned to the local district for analysis and use. In addition to the subject areas tested by TAKS, evaluations of programs funded through grants or other special funding arrangements are also performed. Few are linked to any formal evaluation design or plan. **Exhibit 1–2** indicates the programs, exclusive of core and non-core subjects covered in the TEKS, available in SSAISD and whether the

district evaluates program objectives.

Of the eight programs in **Exhibit 1–2** for which documents indicate the program objectives are to be evaluated, an evaluation plan as recent as June 2003 was provided for only three, Texas Reading First, the Class-Size Reduction Program, and FAST/FASTWORKS. Documentation of evaluation results was provided for two of the remaining five programs, the Urban Systemic Program in December 2001, and the Coca-Cola Valued Youth Program in February 2002.

Student performance is critical in program evaluation. Although student performance improved between 2002–03 and 2003–04, SSAISD secondary student TAKS performance is significantly behind the state average. **Exhibit 1–3** provides information on the percent of students statewide that passed each of the TAKS sub-tests at each grade level. **Exhibit 1–4** provides the same information for SSAISD students.

SSAISD student performance is the most deficient on the TAKS mathematics and science tests (**Exhibit 1–5**). Beginning with grade 6, SSAISD students' performance on the mathematics test ranges from 11 percentage points below those statewide at that grade to 29 and 26 percentage points at grades 8 and 10, respectively. On the science test, SSAISD students' performance was 21

EXHIBIT 1–2
SSAISD PROGRAMS AND EVALUATION STATUS
2003–04

PROGRAM	PROGRAM OBJECTIVES TO BE EVALUATED	TYPE OR DESCRIPTION OF EVALUATION
Urban Systemic Program (USP)	Yes	Multiple measures to determine the extent to which systemic change has occurred.
Class-Size Reduction Program	Yes	Reduction in the number of students in each grade 2 classroom.
Building Good Citizens Program	Yes	Academic performance indicators and service-learning records.
Building Good Health Program	Yes	Academic performance indicators and service-learning records.
Coca Cola Valued Youth Program	Yes	Selected quantitative and qualitative student measure, monthly journals, and various surveys.
Community-Higher Education-Service Partnerships (CHESP)	Yes	Unclear how program evaluation is to be conducted. Evaluation of the service-learning component determined by records of clock hours of service.
FAST/FASTWORKS	Yes	Administration of an "evaluation survey questionnaire."
Texas Reading First	Yes	Per TEA requirements.
Reading Readiness Project	Unknown	The type of evaluation administered by the funding agency is unclear; no results are on file in the district.
Quality Teaching in Mathematics and Science (QTIMS)	Unknown	The type of evaluation administered by an external evaluator is unclear: no results are on file in the district.
Starbase Kelly	Unknown	The type of evaluation administered by the grantor is unclear; no results are on file in the district.
Project SMART	No	Curriculum assessments and various reports on individual students but no evaluation of the program.
Navigator Reading Intervention Program	No	The program information makes no reference to evaluation.

SOURCE: SSAISD, Department of Curriculum, Instruction, and Assessment.

EXHIBIT 1–3
PERCENT OF STUDENTS TESTED STATEWIDE
MEETING TAKS STANDARD BY SUB-TEST AND GRADE
2004

GRADE	PERCENT OF STUDENTS TESTED MEETING TAKS STANDARD*						
	READING	MATH	WRITING	ENGLISH LANGUAGE ARTS	SCIENCE	SOCIAL STUDIES	ALL TESTS
Grade 3	91%	90%	*	*	*	*	N/A
Grade 4	85%	86%	90%	*	*	*	75%
Grade 5	79%	82%	*	*	69%	*	62%
Grade 6	86%	77%	*	*	*	*	73%
Grade 7	83%	70%	91%	*	*	*	65%
Grade 8	89%	66%	*	*	*	88%	63%
Grade 9	84%	59%	*	*	*	*	57%
Grade 10	*	63%	*	75%	64%	87%	49%
Grade 11	*	85%	*	87%	85%	97%	72%

SOURCE: Texas Education Agency, Texas Assessment of Knowledge and Skills, Summary Report, Spring 2004.
NOTE: The passing standard for 2003–04 equals 1 Standard Error of Measurement (1 SEM) below the recommended passing standard or the Panel Recommendation initially effective in spring 2005.
N/A denotes not available

EXHIBIT 1–4
PERCENT OF SSAISD STUDENTS TESTED
MEETING TAKS STANDARD BY SUB-TEST AND GRADE
2004

GRADE	PERCENT OF STUDENTS TESTED MEETING TAKS STANDARD*						
	READING	MATH	WRITING	ENGLISH LANGUAGE ARTS	SCIENCE	SOCIAL STUDIES	ALL TESTS
Grade 3	89%	92%	*	*	*	*	N/A
Grade 4	79%	80%	91%	*	*	*	69%
Grade 5	71%	77%	*	*	64%	*	53%
Grade 6	76%	66%	*	*	*	*	59%
Grade 7	77%	53%	92%	*	*	*	48%
Grade 8	79%	37%	*	*	*	83%	35%
Grade 9	77%	38%	*	*	*	*	38%
Grade 10	*	37%	*	56%	43%	81%	25%
Grade 11	*	66%	*	84%	66%	95%	49%

SOURCE: Texas Education Agency, Texas Assessment of Knowledge and Skills, Summary Report, May 2004.
NOTE: The passing standard for 2003–04 equals 1 Standard Error of Measurement (1 SEM) below the recommended passing standard or the Panel Recommendation initially effective in spring 2005.
N/A denotes not available.

EXHIBIT 1–5
DIFFERENCE IN PERCENT PASSING TAKS BY SUB-TEST AND GRADE
SSAISD AND THE STATE
2003–04

GRADE	SSAISD PERCENTAGE POINTS ABOVE /(BELOW) STATE AVERAGE					
	READING	MATH	WRITING	ENGLISH LANGUAGE ARTS	SCIENCE	SOCIAL STUDIES
Grade 3	(2)	2	*	*	*	*
Grade 4	(6)	(6)	1	*	*	*
Grade 5	(8)	(5)	*	*	(5)	*
Grade 6	(10)	(11)	*	*	*	*
Grade 7	(6)	(17)	1	*	*	*
Grade 8	(10)	(29)	*	*	*	(5)
Grade 9	(7)	(21)	*	*	*	*
Grade 10	*	(26)	*	(19)	(21)	(6)
Grade 11	*	(19)	*	(3)	(19)	(2)

SOURCE: Texas Education Agency, Texas Assessment of Knowledge and Skills, Statewide Preliminary Summary Report, Spring 2004 and SSAISD, Texas Assessment of Knowledge and Skills, Summary Report-Group Performance, April 2004.
NOTE: The passing standard for 2003–04 equals one Standard Error of Measurement (1 SEM) below the recommended passing standard or the Panel Recommendation initially effective in spring 2005.
N/A denotes not available.

percentage points below students statewide at grade 10 and 19 points below at grade 11.

At the lower grades, student performance approximates, and in some areas equals or exceeds, that statewide. For example, at grade 3, the

performance of SSAISD students exceeds that of students statewide in mathematics and is only slightly below students statewide in reading. At grades 4 and 5, SSAISD student performance is slightly below that of students statewide, the largest difference, 8 percentage points, at grade 5 reading. However, when student performance is compared at grades 6 through 11, the differences become more pronounced, 10 or more percentage points on most tests at the grades 6–8 and 20 or more points in some areas in grades 8 through 11. TAKS results in mathematics, English/Language Arts, and science at grade 10 are 19 to 26 percentage points lower than state results while the English/Language Arts results increase in grade 11 when compared with state results. The percent of SSAISD students meeting the TAKS passing standard in social studies approximates the state percentage in all three grades tested.

Graduation and dropout rates are components of program evaluation and the state's new accountability measures in addition to student performance as measured by TAKS and other assessments. Regular, special, and bilingual programs are traditionally included in such reviews. Programs such as special education and bilingual education that receive federal funding are subject to program review that generally consists of a checklist completed and submitted to TEA at the end of each year. The district, however, is not effecting programmatic changes for students in regular, special, and alternative based upon dropout and graduation rates. For example, SSAISD's annual and longitudinal dropout rates for special education students exceed the Region 20 and state rates.

As shown in **Exhibit 1–6**, the dropout rate of SSAISD special education students has exceeded Region 20 and state averages since 1999–2000. In 2001–02, SSAISD's annual dropout rate was twice the state rate and more than 50 percent higher than the Region 20 rate. The longitudinal, or four-year, dropout rate of SSAISD special education students

has exceeded Region 20 and state averages since 1998–99. In 1997–98, the district's dropout rate was below the regional and state rates. Since that year, the regional and state dropout rates have declined and SSAISD's rates have increased from 10.5 percent to 18.7 percent. The special education students in the class of 2002 at South San High School had a 28 percent longitudinal dropout rate.

TEA's Special Education Data Analysis System for 2003–04 noted the district's special education student dropout rate. Out of 78 dropouts the district had in 2001–02, 16 or 20.5 percent were special education students compared to 15.8 percent statewide.

According to a 2001–02 memorandum, special education staff associated the dropout problem with causes such as students not having learned to read, failure to meet student needs and interests, "weak teachers in critical situations on campus," poor attendance, discipline issues, and lack of valuing education on the part of parents and students. Recognizing that the district needed to motivate these students, the special education staff prioritized services and addressed the concern in Campus Improvement Plans and with the summer 2003 initiation of the Children Achieving Tremendous Success (CATS) program. However, the district's *Blueprint for Excellence 2001–2006*, updated for 2003–04 and approved in December 2003, only lists one special education related strategy under Goal 3: Dropout Prevention that mentions conducting a needs assessment in fall 2003 with respect to the drop out rate that includes special education students. The review team did not receive any such needs assessment. In addition, many of the strategies/activities for improvement of student performance listed in the document are general and list student report cards, grades, and performance on assessments as evaluative measurements. While the document demographically details TAKS scores and meets requirements for annual District Improvement Plans, not all strategies list associated funds or have

EXHIBIT 1–6
SPECIAL EDUCATION DROPOUT RATES
SSAISD, REGION 20, AND THE STATE
1997–98 THROUGH 2001–02

	1997–98	1998–99	1999–2000	2000–01	2001–02
ANNUAL DROPOUT RATE					
South San Antonio ISD	1.7%	2.1%	3.1%	2.2%	2.2%
Region 20	2.2%	2.1%	2.2%	1.4%	1.4%
State	1.8%	1.8%	1.6%	1.2%	1.1%
LONGITUDINAL DROPOUT RATE					
South San Antonio ISD	10.5%	13.7%	16.7%	17.8%	18.7%
Region 20	13.3%	12.8%	12.4%	11.4%	10.1%
State	13.0%	12.1%	11.0%	9.7%	8.3%

SOURCE: Texas Education Agency, AEIS, 1999–2000 through 2002–03.

any real measure of program analysis and accountability.

The primary reason for conducting program evaluation is to collect information or data that help administrators identify programs that are and are not working with students. Knowing the extent to which a program is meeting its goals will assist greatly in determining whether to continue with no or limited changes or to make significant modifications or even terminate. The current concerns related to accountability, limited funding, and additional requirements from state and federal agencies has led to a greater emphasis on program evaluation.

The steps in program evaluation are similar to those in many administrative tasks in that it requires deliberate and thoughtful planning to ensure efforts are fruitful and lead to improvement. Guidelines and procedures must be developed early in the process to ensure that the evaluation conducted is comprehensive. The process of evaluation involves gathering information so that decisions are based upon quantifiable data. The process is often completed systematically in many districts and is recorded for future modification or replication based on a review of annual implementation results. In many districts, the results are communicated clearly and accurately so that decisions related to program continuation and resource allocation are justifiably made.

To cause personnel to focus on the importance of program evaluation, Dallas ISD requires all program managers to include evaluation methods in any program proposal. All evaluation designs must receive approval from the appropriate offices and the executive team before the proposals can be submitted for either internal or external funding consideration. In addition, the district developed a monitoring system that allows administrators to evaluate program performance on a monthly basis and to report various performance measures to the superintendent. Dallas included training for program administrators and selected campus personnel to effectively implement the program evaluation districtwide.

Laredo ISD has developed standards to evaluate the effectiveness of non-core curricular and non-academic programs. The format is based on the state's accountability system and includes the specific conditions necessary to meet the ratings of *exemplary, recognized, satisfactory,* and *unacceptable.*

The district should immediately establish a schedule to review all instructional programs and identify districts and/or campuses to visit for programmatic review at all levels and addressing all programmatic

needs. The district should form a team that includes teachers who have the most success with student performance, librarians, counselors, campus administrators, and central office administrators to plan, implement, and provide oversight of the instructional program review and any needed changes or modifications.

For example, campuses with effective secondary instructional programs include Edinburg North High School in Edinburg ISD that was awarded an *AP Inspiration Award* in 2004 and W.T. White in Dallas ISD that won the award in 2003. *Inspiration Awards* are given to campuses making strides in increasing student enrollment in Pre-AP and AP courses and increasing the percentage of qualifying test scores.

The fiscal impact of this recommendation is based on the assumption that travel to visit districts, program administrators, and classrooms will take place in the first year of the district's effort, and training will be brought to the district periodically to support different initiatives that support the plan. If 16 people are divided into groups of four to travel to Edinburg, Dallas, Laredo, and Galena Park, two automobiles can take four people each to the designated destination. The round-trip mileage costs would be $314 for Edinburg, $380 for Dallas, $216 for Laredo, and $284 for Galena Park for a mileage total of $1,194 using the state rate of $.35 per mile and using the state's automatic mileage guide. Additional expenses should include hotel costs for one night (16 x $80 = $1,280) and per diem meal costs for two days to accommodate travel and visitation for each person (16 x $30 x 2 days = $960) to equal total visitation costs of $3,434 ($1,194 + $1,280 + $960).

The cost of training may vary each year depending on the district's needs. Estimated costs for consultants to assist the district in program evaluation efforts include $400 per day per consultant or regional representative plus associated travel and per diem costs. The district should host consultant-led workshops for two days in length resulting in costs of $800 for consultant fees + $200 for mileage/flight + $60 per day for food for two experts + $160 for two hotel rooms equaling $1,220 per session. Since follow-up training during the year will be important, the district should host eight sessions to accommodate district representatives from the elementary, middle, and high school regular, special education, bilingual, and career and technology departments at a cost of $1,220 x 8 = $9,760 annually. Five year costs equal $52,234 ($13,194 initial year costs + $9,760 each of the four years thereafter).

SECONDARY CURRICULUM
(REC. 2)

SSAISD does not have a defined curriculum for all subjects and grade levels particularly for many secondary courses. In addition, South San Antonio High School was one of 199 schools in the state that failed to make Adequate Yearly Progress according to NCLB guidelines for the second year in a row. Currently in SSAISD, curriculum guides available for grades 9–11 are in English/Language Arts, mathematics, science, and social studies. Some of the available guides are course-specific. Others, however, contain no information to indicate which of the curriculum concepts in the guides are associated with which of the courses offered at that grade. No guides are available for grade 12 or for any enrichment area, and no plans have been made for their development. In spring 2004, however, the State Board of Education mandated use of the TEKS for the enrichment curriculum.

The district's curriculum guides, referred to as *Timeline/Scope and Sequence* documents, are available in four content areas—English/Language Arts, mathematics, science, and social studies—in grades kindergarten through 11. Each guide follows the same format that includes a number of curriculum concepts aligned to the TEKS and TAKS objectives with suggested resources and methods of assessment for each. The guides are divided into timelines, e.g. August 18 through October 3, that identify the timeframe in which the concepts are to be taught. District personnel have developed local benchmark tests that are administered districtwide by grade level and content area three to four times a year. The tests are scored by the district's Office of Student Assessment and returned to the campuses.

The Department of Curriculum, Instruction, and Assessment supervises the development and revision of these guides. Teachers are hired for several weeks in June as guide writers and are assisted by vertical team leaders, teachers with expertise in specific content areas hired to assist with the implementation and quality control of the curriculum development effort. Teacher input, current year TAKS data, and benchmark results are used in the annual guide revision process. The teacher-writers and vertical team leaders provide in-service in August to train teachers in the process of using the documents.

Each SSAISD high school provides a catalog of courses offered as well as other information useful to students in planning their courses of study for the coming year. Each course catalog lists the title of the course, the grade at which the student would typically take the course, the number of credits earned on successful completion, any prerequisite course that must have been taken, and a brief description of the course. Exclusive of athletics and spirit groups, the 2004–05 course catalog for South San Antonio High School lists 224 courses, and the catalog for South San Antonio High School West lists173 courses. Of that number, 147 are common courses offered at both schools; 67 are offered only at South San Antonio High School; and 26 are unique to the West campus. The number of courses offered and the number of subject area and course specific guides available at one of the two SSAISD high schools by subject area is presented in **Exhibit 1–7**.

In addition to a listing of high school course offerings and a review of student scores on the

EXHIBIT 1–7
SSAISD COURSE OFFERINGS
GRADES 9–12
2004–05

		AVAILABLE GUIDES		
SUBJECT AREA	COURSES OFFERED	SUBJECT AREA	COURSE SPECIFIC	TOTAL
English/Language Arts	21	9th Grade 10th Grade	English III	3
Mathematics	19	11th Grade	Algebra I	2
Science	15	0	Biology I Chemistry Physics Integrated Physics and Chemistry	4
Social Studies	16	0	World History World Geography U.S. History	3
Journalism	9	0	0	0
Spanish	10	0	0	0
French	4	0	0	0
American Sign Language	3	0	0	0
Physical Education/Health	11	0	0	0
Junior ROTC*	5	0	0	0

EXHIBIT 1–7 (CONTINUED)
SSAISD COURSES OFFERINGS
GRADES 9–12
2004–05

		AVAILABLE GUIDES		
SUBJECT AREA	**COURSES OFFERED**	**SUBJECT AREA**	**COURSE SPECIFIC**	**TOTAL**
Communications Applications	1	0	0	0
Fine Arts	31	0	0	0
Business	21	0	0	0
Family and Consumer Science	9	0	0	0
Career and Technology Education	65	0	0	0
Total	240	3	9	12

SOURCE: SSAISD, South San Antonio High School and South San Antonio High School West, Course Catalogs, 2004–05.
*Denotes Reserve Officer Training Corps.

statewide assessment as listed in **Exhibits 1-3**, **1-4**, and **1-5**, a review of the district's secondary student participation and scores on college entrance examinations and advance placement exams also reveals a disconnect and/or an inconsistency in curriculum presentation and expected student outcomes.

Exhibit 1–8 shows the number of SSAISD students taking AP exams and the number qualifying for college credit. In order to qualify for college credit the student must score "3" or better on the exam. Only 7.3 percent of the students taking exams received a 3 or "qualified" score and 4.0 percent received a 5 or "extremely well-qualified" score. All of the "extremely well-qualified were on the Spanish Language Exam. No students scored 4, "well-qualified."

The district offers advanced courses including Pre-AP and AP in all core content areas. Funds to support the purchase of advanced materials and training are provided through the Gifted and Talented program's budget.

Curriculum guides serve as work plans for teachers, identifying instructional priorities for learning and supportive resources, suggesting approaches for delivering instruction in the classroom, and connecting what is to be taught both vertically and horizontally within the system. Well-written guides not only describe what students are expected to be able to do but also how the knowledge or skill learned is to be measured.

Board-approved written curriculum guides help ensure appropriate coordination between what is taught within grades at different schools and among the various grades throughout the district. In the absence of guides for all subjects and courses, teachers are forced to rely on their own resources in planning and delivering instruction. While the teaching may be excellent, without guides the district has no guarantee that it matches the district's instructional intent. Guides also provide a basis for uniform monitoring and evaluating of student performance across the district.

Two districts, for example, have developed processes

EXHIBIT 1–8
SSAISD ADVANCED PLACEMENT EXAMINATION GRADES
2002–03

COURSE DESCRIPTION	**STUDENTS TAKING EACH EXAM**	**GRADE OF 3 (QUALIFIED)**	**GRADE OF 4 (WELL-QUALIFIED)**	**GRADE OF 5 (EXTREMELY WELL-QUALIFIED)**
Biology	11	*	0	0
Calculus	18	*	0	0
English Lang/Comp	65	*	0	0
English Lit	23	*	0	0
Physics	*	0	0	0
Spanish Language	16	*	0	8
Spanish Lit	11	*	0	0
U.S. History	29	*	0	0
Government	13	0	0	0
Macro-Eco	13	0	0	0
Total	203	15	0	8
Percent with Grades 3, 4, or 5	N/A	7.4%	0%	3.9%

SOURCE: College Board Student Grade Roster, May 2003.
NOTE*: Not identified per FERPA regulations.

for developing curriculum guides. San Angelo ISD has provided extensive process training to teams composed of teachers and administrators from grades pre-Kindergarten through twelve who drafted subject-area standards using TEKS, national standards, and resources from other school districts, professional organizations, and associations. Laredo ISD has developed academic standards for core areas and technology. Each subject area standard includes statements of understanding, essential questions to be asked, content and performance standards, assessment criteria, TEKS skills, TAKS objectives, and curricular resources where appropriate. Many other districts work with their Regional Education Service Centers to purchase curriculum guides and associated training. Region 4, for example, has a catalog of curriculum guides and associated training and materials that many districts within the state and nation purchase in an individualized fashion.

Many districts experiencing greater numbers of students achieving benchmark-passing criterion for SAT/ACT and AP exams credit this achievement to stringent classroom study tactics and enhanced curriculum. At minimum, secondary courses use current curriculum aligned to the state's standards, the TAKS, and, often, national standards. Cedar Hill ISD reviews AP course offerings on an annual basis using historical student passing trends to adjust curriculum and to ensure teachers have received AP training in the appropriate areas. Teachers and administrators serve on these review teams.

The district should purchase and/or develop curriculum guides for all subject areas and courses offered particularly those at the secondary level. The guide format currently in use in the district should be modified for use in the development of new guides and to make existing guides course-specific. Objectives should be clearly stated and the concept, knowledge, or skill that the student is expected to know or learn keyed to specific local or state assessments. Efforts should be taken to ensure that alignment of the curriculum across grade levels and

between sequential courses is addressed appropriately. To be most useful to teachers, guides must be current. They should be reviewed according to a three-five year cycle to ensure they remain updated with subject advances, contain the elements useful to classroom teachers, and match statewide textbook adoptions. The district should annually prioritize development, review and update of curriculum guides.

This fiscal impact assumes the district will obtain outside assistance from an entity such as Region 4 that specializes in curriculum development and provide a stipend of $1,000 each to teachers to assist in document customization.

New funds for development of guides for the 224 courses at grades 9–12 for which guides are not currently available is estimated at $319,400 as an initial investment by the district. This fiscal impact is conservatively based upon allocations of $1,000 per course or $224,000 for initial course assessment and base document development, an additional $225 per course for related materials for a total of $50,400, and an additional $45,000 for teacher stipends allocated to a team of teachers directed to lead the curriculum efforts ($224,000 + $50,400 + $45,000 = $319,400). Region 4 also provides specialized curriculum assistance to districts in core areas; as a result, the district may review monetary allocations to address curricular needs, including the 224 courses at the secondary level, and appropriately fund courses or core areas as necessary.

SPECIAL EDUCATION PRE-REFERRAL PROCEDURES FOR LEP STUDENTS (REC. 3)

SSAISD does not follow pre-referral procedures in the identification of LEP students as special education students. SSAISD has a disproportionate percentage of LEP students in special education. As shown in **Exhibit 1–9**, 18.1 percent of SSAISD's students were LEP in 2001–02 and 17.2 percent were LEP in 2003–04. However, the percentage of LEP students identified as special education was 25

EXHIBIT 1–9
SSAISD SPECIAL EDUCATION LEP STUDENTS
2001–02 THROUGH 2003–04

STUDENT GROUP	2001–02	2002–03	2003–04
LEP students	1,814	1,671	1,726
Percent LEP	18.1%	16.7%	17.2%
Special education students	1,383	1,300	1,112
Special education and LEP	346	334	244
Percent special education LEP	25.0%	25.7%	21.9%
District percentage difference	(6.9%)	(9.0%)	(4.7%)
State percentage difference	(2.6%)	0.5%	0.2%
Risk level	2	3	3

SOURCE: *Texas Education Agency, Special Education Data Analysis System, 2001–02 through 2003–04*

percent in 2001–02 and 21.9 percent in 2003–04.

Both the May 1998 and the November 2000 TEA District Effectiveness and Compliance (DEC) reports identified overrepresentation of students with limited English proficiency in special education as a concern. Both reports recommended that the district conduct a comprehensive evaluation of its pre-referral process, its nondiscriminatory assessment procedures, and the performance of LEP students found eligible for special education services. SSAISD's corrective action plan in response to the 1998 DEC report indicated that the district would provide support initiatives such as the summer academy, tutoring, and dyslexia services before referring LEP students having learning difficulties to special education. The corrective action plan also indicated the need for bilingual diagnosticians, the adoption of non-biased assessments and the provision of staff development on language/learning disability versus language/learning differences.

In 2001–02, the district amended its referral process for LEP students experiencing learning difficulties. Under the amended process the Special Education Department accepts referrals of LEP students for consideration as learning disabled (LD) or as speech impaired (SI) only if the student is English dominant or if the student has had three years of bilingual instruction.

The November 2000 DEC report, as did the 1998 report, recommended that the district evaluate its pre-referral process, its nondiscriminatory assessment procedures, and the performance of LEP students found eligible for special education services due to lax implementation of the pre-referral process. Although SSAISD implemented several initiatives such as placing LEP students in a full-day pre-Kindergarten program to give them exposure to a language rich environment and the use of nondiscriminatory language assessment instruments, the district did not evaluate the impact of these initiatives on referral and placement of LEP students in special education.

The district's 2001–02 Program Analysis System (PAS) Action Plan also reiterated the pre-referral policy concerning Spanish-dominant LEP students. However, the continuous presence of a disproportionate percentage of LEP students in special education through 2003–04 points to lack of implementation of the district's pre-referral procedures revised in 1999 that LEP students not be referred to special education until they have had three years of bilingual education or are English proficient.

SSAISD should follow pre-referral procedures, provide staff development, and monitor referrals of Limited English Proficiency students as special education students. The Special Education Department should train its staff on the pre-referral process involving students with limited English proficiency. The Special Education Department should closely monitor the implementation of the pre-referral process involving such students that their difficulties are caused by disability rather than by language. Following the district pre-referral process should reduce inappropriate referrals to special education.

CAREER AND TECHNOLOGY EDUCATION PROGRAM (REC. 4)

The district does not consistently use enrollment trends or consider community and business needs when making decisions regarding Career And Technology Education (CATE) courses, particularly those related to Technology Preparation. In addition, SSAISD does not have a formal process for removing or consolidating CATE classes that are under-enrolled due to a lack of community need or student interest. Since 1997–98, only seven CATE courses have been phased out due to low enrollment. No introductory CATE courses are available at the middle school level although Career Investigations is planned for 2004–05 at one middle school.

Exhibit 1–10 shows that the percent of SSAISD students taking CATE classes is below state and Region 20 levels, although the district provides staff at 4.2 percent, which is above Region 20 and the

EXHIBIT 1–10
PERCENT OF STUDENTS, TEACHERS, AND BUDGETED
INSTRUCTIONAL OPERATING EXPENDITURES IN
CATE PROGRAMS IN SSAISD AND PEER DISTRICTS

DISTRICT	CATE STUDENT ENROLLMENT AS A PERCENTAGE OF TOTAL ENROLLMENT	CATE TEACHERS AS A PERCENTAGE OF TOTAL NUMBER OF TEACHERS	CATE OPERATING EXPENDITURES AS A PERCENTAGE OF TOTAL EXPENDITURES
South San Antonio ISD	15.3%	4.2%	4.5%
Harlandale ISD	17.2	3.7	3.1
Edgewood ISD	18.0	4.4	4.1
Mercedes ISD	18.5	4.3	3.5
Roma ISD	30.7	4.3	6.4
Region 20	19.3	4.1	4.1
State	19.8%	4.2%	4.1%

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

same as state levels, and funds the program above Region 20 and state levels at 4.5 percent.

The district offers an array of CATE courses but enrollments in some are low. Of 63 courses offered in 2003–04, 38 (60.3 percent) had enrollments of fewer than 15 students. Twenty-two (34.9 percent) had enrollment of fewer than 10 students. The district reduced the number of hours, usually from three to two hours, in some of the courses in the last couple of years so that more students would be able to add CATE classes. **Exhibit 1–11** identifies the courses offered for the 2003–04 school year, including the grades where the courses are available, the amount of credit gained, enrollment numbers, and the location of the courses.

SSAISD students have enrolled in Tech Prep courses in smaller percentages than the peer districts that participate in the program. Based on research conducted by TEA, students enrolled in Tech Prep in high school had lower dropout rates, higher average high school graduation rates, and a higher percentage of graduates who entered colleges or universities than those not enrolled in Tech Prep. **Exhibit 1–12** shows Tech Prep enrollment for the last three years for SSAISD and its peer districts.

Continuing to offer courses with low enrollment will result in reduced resources for Tech Prep courses that prepare students for careers and education beyond high school. When courses are static, teachers have little incentive to rework classes to make them more attractive to students and to attract higher enrollments.

EXHIBIT 1–11
CAREER AND TECHNOLOGY EDUCATION
SSAISD PROGRAM OFFERINGS
2003–04

COURSE	GRADES OFFERED	CREDIT	ENROLLMENT	LOCATION(S)
BUSINESS/OFFICE TECHNOLOGY				
Keyboarding	9–12	0.5	763	Both High Schools
BCIS	10–12	1.0	555	Both High Schools
Accounting	11–12	1.0	11	South San Antonio West High School
Introduction to Business	9–12	1.0	14	South San Antonio High School
Business Communication	11–12	1.0	39	South San Antonio High School
Business Management	10–12	1.0	11	South San Antonio High School
Computer Science I	10–12	1.0	24	South San Antonio High School
Webmastering	10–12	1.0	142	Both High Schools
Independent Study; Tech Applications	11–12	1.0	7	South San Antonio High School
Computer Multi-media	10–12	1.0	53	Both High Schools
Multimedia	10–12	1.0	39	South San Antonio High School
Business Career Preparation*	11–12	3.0	11	South San Antonio West High School
Information Tech Applications I*	11	2.0	5	Advanced Tech Center
Information Tech Applications II*	12	2.0	2	Advanced Tech Center
BCIS II County Court*	11–12	3.0	11	Career Center
BCIS II City Hall*	11–12	3.0	13	Career Center
Business Career Prep I*	11	3.0	6	Career Center
Business Career Prep II*	12	3.0	9	Career Center
FAMILY AND CONSUMER SCIENCE				
Personal & Family Development	9–12	1.0	127	Both High Schools
Career Connections	9–12	0.5	46	Both High Schools
Nutrition & Food Science	10–12	0.5	92	Both High Schools
Interior Design	10–12	0.5	11	South San Antonio High School
Individual & Family Life	10–12	0.5	36	Both High Schools
Prep for Parenting	10–12	0.5	10	South San Antonio High School
Career Studies	9–12	0.5	35	Both High Schools
HEALTH SCIENCE TECHNOLOGY				
Child Care I**	11–12	2.0	25	Career Center.
Child Care II**	12	2.0	18	Career Center
Health Science Technology I**	11–12	2.0	35	Career Center
Health Science Technology II**	12	3.0	18	Career Center

EXHIBIT 1–11 (CONTINUED)
CAREER AND TECHNOLOGY EDUCATION
SSAISD PROGRAM OFFERINGS
2003–04

COURSE	GRADES OFFERED	CREDIT	ENROLLMENT	LOCATION(S)
Marketing	Not Listed	Not Listed	Not Listed	Not Listed
Marketing Dynamics	11–12	3.0	8	Career Center.
Marketing Management	12	3.0	3	Career Center
Hotel Management	10–12	3.0	11	Career Center
TRADE AND INDUSTRIAL TECHNOLOGY				
Introduction to Criminal Justice	11–12	1.0	5	Career Center.
Criminal Justice Preceptorship	12	2.0	8	Career Center.
Crime in America	11–12	1.0	29	Career Center
A/C & Refrigeration I	10–11	2.0	9	Career Center.
A/C & Refrigeration II	12	2.0	3	Career Center
Auto Collision I	10–11	3.0	15	Career Center
Auto Collision II	12	3.0	8	Career Center
Auto Technician I	11	2.0	14	Career Center
Auto Technician II	12	3.0	12	Career Center
Building Trades I	10–11	2.0	9	Career Center
Building Trades II	12	3.0	4	Career Center
Aircraft Mechanics I*	11	2.0	6	Advanced Tech Center
Aircraft Mechanics II*	12	2.0	1	Advanced Tech Center
Mill and Cabinetry I	10–12	2.0	7	Career Center
Mill and Cabinetry II	12	2.0	5	Career Center.
Cosmetology I	11	3.0	24	Career Center
Cosmetology II	12	3.0	12	Career Center
Architectural Draft & Design I	10–11	2.0	11	Career Center
Architectural Draft & Design II	12	2.0	9	Career Center
Graphic Arts I	10–11	2.0	5	Career Center
Graphic Arts II	12	2.0	6	Career Center
Welding Trades I	10–11	2.0	21	Career Center
Welding Trades II	12	2.0	7	Career Center
Introduction to Construction Careers	9–12	0.5	37	Career Center
Introduction to Metal Trades	9–12	0.5	42	Career Center
Introduction to Construction AC/EL	9–12	0.5	26	Career Center
Introduction to Construction C/Paint	9–12	0.5	28	Career Center
Introduction to Transportation Service	9–12	0.5	12	Career Center
Trade and Industrial Career Prep I	11–12	3.0	13	Career Center
Trade and Industrial Career Prep II	12	3.0	4	Career Center

SOURCE: SSAISD, Career And Technology Education Office, May 2004.
*Tech Prep prior to current state review; **newly approved state Tech Prep courses.

EXHIBIT 1–12
TECH PREP ENROLLMENTS, GRADES 9–12
2000–01 THROUGH 2002–03

DISTRICT	2000–01	2001–02	2002–03
Roma ISD	0	0	0
South San Antonio ISD	13	15	*
Edgewood ISD	29	30	*
Mercedes ISD	118	88	133
Harlandale ISD	189	265	615

SOURCE: Texas Career And Technology Education Clearing House, May 2004.
* Denotes five or fewer not identified for privacy reasons.

SSAISD should evaluate current Career And Technology Education (CATE) courses and restructure offerings so that the needs of students are met. The district needs to be more aggressive in identifying and providing courses for students that meet the CATE Program's goals of having "(E)ach public school student…master the basic skills and knowledge necessary for managing the dual roles of family member and wage earner; and gaining entry-level employment in a high-skill, high-wage job or continuing the student's education at the post-secondary level." To accomplish the needed review

and restructuring of CATE courses, an advisory committee composed of key administrators in the curriculum department, principals, counselors, teachers, and members of the business community should be formed. The committee should research future career needs and possible courses that would meet those needs using data from the Texas Workforce Commission, Alamo Tech Prep Consortium, resources from TEA, etc.

To evaluate and identify existing courses that no longer meet CATE goals and to plan for new courses, the committee should use the TEA publication, *High Schools that Work: Goals, Key Practices, and Key Conditions* which outlines practices that support accelerating student achievement including:

- reviewing classes based on enrollment;

- evaluating classes to determine their support of CATE goals by judging them based on the extent to which the courses meet the criteria of emphasizing high-level mathematics, science, language arts, and problem-solving skills in the context of modern workplace practices;

- removing classes that are under-enrolled and identify new courses that meet criteria; work collaboratively with other educators, employers, and workers so that students leave school with credit toward industry-recognized credential and employment; and

- providing individual guidance and a structured system of extra help so that the district ensures that students successfully complete an accelerated program of study with a career or academic focus.

The district should emphasize should adding Tech Prep classes to meet local business and community needs and adequately prepare students in this regard. In addition to looking at the high school offerings, consideration should also be given to initiating introductory classes at the middle schools. The focus must be on eliminating the general educational track and replacing it with an upgraded academic core and

to foster close communication with curriculum personnel. To accomplish this, the CATE Department should also report to a Curriculum and Instruction administrator. The move supports key conditions outlined by TEA in *High Schools that Work*.

ENGLISH AS A SECOND LANGUAGE PROGRAM (REC. 5)

SSAISD's bilingual/English as a Second Language program does not have enough endorsed teachers and has not been proactive in making parents aware of the benefits of the bilingual/ESL program. SSAISD has a small number of teachers with ESL endorsements at the secondary level where the majority of the district's identified ESL students are enrolled. An endorsement identifies the subject area in which a certified teacher is authorized to teach. In 2003–04, SSAISD had eight ESL teachers and 291 students. Of the 291 ESL students, 98.3 percent were at the secondary level. In 2003–04, SSAISD had five ESL students in early childhood through grade 1, 159 in middle school, and 127 in the high school (**Exhibit 1–13**).

Teachers working with ESL students have also not received sufficient training in ESL strategies. Although they have participated in some training on strategies, teachers indicated on a 2003–04 staff development survey that additional training was needed as well as training in differentiated instruction. To encourage teachers to participate in bilingual/ESL staff development, the district offered a $100 a day stipend if they attend the full day of training. In 2003–04, SSAISD offered training to middle and high school through Region 20, Universidad Nacional Autonoma de Mexico (UNAM)-San Antonio, and Project YEA (Youth Engaged Academically) training.

SSAISD has also not made parents aware of the benefits of the bilingual/ESL program resulting in a high percentage of participation refusals. As shown in **Exhibit 1–14**, approximately 80 percent of children with limited English proficiency participated in SSAISD's bilingual/ESL program between

EXHIBIT 1–13
SSAISD ESL STUDENTS BY SCHOOL
2003–04

SCHOOL	NUMBER OF ESL STUDENTS
Royalgate Elementary	*
Dwight Middle School	84
Kazen Middle School	47
Shepard Middle School	28
South San High School West Campus	18
South San High School	109
Total	*

SOURCE: SSAISD, Bilingual/ESL Program Enrollment, 4ᵗʰ Six Weeks, 2003–04.
NOTE: Not identified per FERPA regulations.

EXHIBIT 1–14
SSAISD BILINGUAL/ESL PROGRAM PARTICIPATION
1999–2000 THROUGH 2003–04

DISTRICT	1999–2000	2000–01	2001–02	2002–03	2003–04*
Number of LEP Students	1,814	1,671	1,659	1,726	1,746
Number of Bilingual/ESL Students	1,418	1,309	1,323	1,407	1,541
Number of Non-participants	396	362	336	319	205
Percent of Non-participants	21.8%	21.7%	20.2%	18.5%	11.7%

SOURCE: Texas Education Agency AEIS, 1999–2000 through 2002–03.
* SSAISD Bilingual/ESL Program Enrollment, April 6, 2004.

1999–2000 and 2002–03. SSAISD increased program participation in 2003–04.

TEA's Program Analysis System (PAS) for 2003–04, however, assigned a risk level 4, the highest risk level, to the district because of the percentage of LEP students whose parents declined bilingual or ESL services. SSAISD's denial rate, 17.2 percent, was nearly three times higher than the state rate of 6.9 percent. SSAISD also received a risk level 4 in the PAS evaluation in 2001–02, when the district denial rate of 20.2 percent was more than twice the state rate of 8.0 percent. TEA uses a district-level Program Analysis System (PAS), renamed in 2004 to Performance-Based Monitoring Analysis System, to evaluate the performance of education programs based on predetermined criteria and assigns risk levels. Risk levels range from 0 to 4.

Refusal rates are particularly high at the secondary level. In 2003–04, of 286 secondary level students identified as having limited English proficiency, 134 or 46.8 percent refused participation. Although the District Improvement Plan calls for monitoring the percentage of parents that refuse to have their children participate in the bilingual/ESL program, it does not specify any strategies for increasing program enrollment.

SSAISD does not educate parents about the bilingual/ESL program and its benefits aside from distributing the TEA brochure on bilingual/ESL education. Campus staff follow up with parents who refused services. Yet, the follow-up form they use does not ask specifically for reasons the parents declined services. SSAISD does not have a districtwide report analyzing why parents refused services. The refusal of services form signed by the parent and the follow up form are filed in the student's permanent file on the respective campus. Campus staff does not provide the district Bilingual/ESL Department staff with aggregate data on parents who refused services. SSAISD program staff said that parents who refuse to enroll their children in bilingual/ESL typically want their children to be part of the regular English curriculum from the start. According to program staff, these parents are not well informed about the bilingual/ESL program and its benefits.

The performance of LEP and bilingual/ESL students on the TAKS lags behind the performance of non-LEP students and those who are not in the bilingual/ESL program. As shown in **Exhibit 1–15,** LEP, bilingual, and ESL students lagged behind other students in all grade levels and subject areas except reading in grade 3 and math in grades 3 and 4.

EXHIBIT 1–15
PERCENTAGE OF SSAISD STUDENTS PASSING TAKS
2002–03

GRADE/ SUBJECT	TAAS PASS RATES					
	LEP STUDENTS	NON-LEP STUDENTS	BILINGUAL STUDENTS	NON-BILINGUAL STUDENTS	ESL STUDENTS	NON-ESL STUDENTS
GRADE 3						
Reading	81%	70%	84%	70%		
Math	93%	92%	93%	92%		
GRADE 4						
Reading	75%	85%	75%	85%		
Math	87%	86%	88%	86%		
Writing	76%	83%	77%	83%		
All Tests	66%	72%	66%	72%		
GRADE 5						
Reading	48%	78%	46%	78%		
Math	74%	89%	74%	89%		
Science	48%	76%	48%	75%		
All Tests	31%	63%	29%	63%		

EXHIBIT 1–15 (CONTINUED)
PERCENTAGE OF SSAISD STUDENTS PASSING TAKS
2002–03

GRADE/ SUBJECT	TAAS PASS RATES					
	LEP STUDENTS	NON-LEP STUDENTS	BILINGUAL STUDENTS	NON-BILINGUAL STUDENTS	ESL STUDENTS	NON-ESL STUDENTS
GRADE 6						
Reading	17%	78%			25%	77%
Math	25%	70%			31%	69%
All Tests	14%	60%			19%	59%
GRADE 7						
Reading	40%	83%			40%	83%
Math	21%	63%			18%	62%
Writing	45%	91%			44%	90%
All Tests	9%	58%			7%	58%
GRADE 8						
Reading	26%	82%			23%	82%
Math	29%	55%			31%	55%
Social Studies	56%	93%			64%	92%
All Tests	19%	54%			14%	53%
GRADE 9						
Reading	24%	77%			20%	75%
Math	5%	39%			5%	38%
All Tests	0%	39%			0%	38%
GRADE 10						
Reading	21%	52%			0%	51%
Math	16%	50%			38%	47%
Social Studies	55%	80%			25%	79%
Science	13%	50%			14%	48%
All Tests	3%	27%			0%	26%
GRADE 11						
English Language Arts	20%	58%				57%
Math	26%	48%			25%	47%
Social Studies	56%	87%			50%	86%
Science	20%	49%			21%	48%
All Tests	7%	30%			7%	30%

SOURCE: Texas Education Agency, TAKS Summary Report, 2002–03.
NOTE: Shading denotes test not administered in that subject at that grade level.

For example, in grade 5, 48 percent of LEP students compared with 78 percent non-LEP students passed TAKS reading, 74 percent LEP students compared with 89 percent non-LEP passed math, and 48 percent LEP students compared with 76 non-LEP students passed TAKS science. The percentage difference between LEP and bilingual/ESL students and other students increased in higher grades.

Exhibit 1–16 compares the performance of LEP, bilingual and ESL students in SSAISD on the 2001–02 TAAS with their performance on the 2002–03 TAKS. As the TAKS is a more rigorous test, the performance of all student groups declined. However, the performance of SSAISD LEP, bilingual and ESL students in grade 5 through grade 10 in 2002–03 was significantly lower than their 2001–02 cohorts.

Recognizing that the ESL program does not meet student needs, the district is considering other strategies such as an intensive language program for recent immigrants, a sheltered English program, or a magnet language academy. Sheltered English is an instructional approach used to make academic instruction in English understandable to LEP students. Students in these classes are insulated in that they do not compete academically with native English speakers since the class includes only LEP students. Information received from SSAISD staff also indicates that other efforts have been initiated including plans to hire an ESL teacher-facilitator to provide ESL instructional program support, developing a proposal for improving the secondary ESL program, and providing training for a group of middle and high school teachers in what constitutes best practice in the sheltered instruction approach to teaching ESL students.

San Angelo ISD provides academic and financial support for its classroom teachers who wish to pursue certification or endorsement. The district sponsors study sessions and provides a one-time $250 stipend to teachers upon certification. Since the inception of the program in 1995, 330 teachers participated in the ExCET study sessions and have

EXHIBIT 1–16
PERCENTAGE COMPARISON
SSAISD LEP, BILINGUAL, AND ESL STUDENTS PASSING TAAS/TAKS
2001–02 AND 2002–03

SUB-TEST	LEP			BILINGUAL			ESL		
	2001–02 TAAS	2002–03 TAKS	GAIN/ (LOSS)	2001–02 TAAS	2002–03 TAKS	GAIN/ (LOSS)	2001–02 TAAS	2002–03 TAKS	GAIN/ (LOSS)
GRADE 3									
Reading	80%	81%	1	81%	84%	3			
Math	88%	93%	5	87%	93%	6			
GRADE 4									
Reading	81%	75%	(6)	80%	75%	(5)			
Math	93%	87%	(6)	92%	88%	(4)			
Writing	78%	76%	(2)	77%	77%	0			
All Tests	70%	66%	(4)	68%	66%	(2)			
GRADE 5									
Reading	74%	48%	(26)	80%	46%	(34)			
Math	93%	74%	(19)	100%	74%	(26)			
All Tests	76%	31%	(45)	82%	29%	(53)			
GRADE 6									
Reading	23%	17%	(6)				16%	25%	(9)
Math	56%	25%	(31)				56%	31%	(25)
All Tests	23%	14%	(9)				12%	19%	(7)
GRADE 7									
Reading	63%	40%	(23)				53%	40%	(13)
Math	79%	21%	(58)				70%	18%	(52)
All Tests	66%	9%	(57)				52%	7%	(45)
GRADE 8									
Reading	44%	26%	(18)				38%	23%	(15)
Math	63%	29%	(34)				62%	31%	(31)
All Tests	19%	19%	0				17%	14%	(3)
GRADE 10									
Reading	63%	21%	(42)				33%	0%	(33)
Math	65%	16%	(49)				64%	38%	(26)
All Tests	38%	3%	(35)				25%	0%	(25)

SOURCE: TAKS Summary Report, 2001–02 and 2002–03.
NOTE: Shading denotes test not administered in that subject at that grade level.

received their bilingual/ESL certification or endorsement.

Killeen ISD increased parental understanding of the bilingual/ESL program through a number of informational measures. It prepared a video on the program and distributed handbooks and written materials available in several languages explaining the benefits of bilingual/ESL services.

SSAISD's ESL middle school program offers an ESL Language Arts class and an ESL reading class. The LPAC determines whether a student should take one or two ESL classes. The students attend regular classes in other content areas with ESL trained teachers. Recent immigrants are assigned to two ESL classes and get tutoring after school.

SSAISD should also include a parent information program about the bilingual/ESL program and its benefits to increase program participation when reviewing the entire program. SSAISD should develop a plan to inform and educate parents of children with limited English proficiency about its bilingual and ESL programs and how these programs benefit students. The district should encourage parents to participate in an information session when

they register their children for school about the bilingual/ESL program. The information session should include presentations by bilingual/ESL staff describing the services provided to participating students at the elementary and the secondary levels. It should also include testimonials by students.

This fiscal impact is based on the assumptions that SSAISD will pay for teachers to get an ESL endorsement, and that the district will work with a consultant to modify its ESL program to include modifications to enhance student performance and parent consent for student participation. The district should initiate a program to encourage teachers to obtain an ESL endorsement by taking the ESL ExCET test. The district should stress the benefits of getting such an endorsement and the financial support that it will provide to teachers seeking an endorsement by paying for their ESL training and exam fees. The district should review ESL programs that have proven effective in similar districts and implement such a program in its middle and high schools.

It is recommended that SSAISD pay five teachers to get an ESL endorsement for inclusion in an ESL teacher pool. Currently, the district pays teachers a

stipend of $2,000 to actually teach ESL classes. The district already uses the two-day Region 20 ESL workshop and the TEA ESL summer institute for endorsement opportunities. The Region 20 ESL workshop is free as the district is a member in the Region 20 ESL cooperative, and membership covers the training. The TEA ESL summer institute, which teachers could attend in summer 2005, costs $150 per teacher. The ESL ExCET test fee is $200 per teacher for a total of $350 ($150 for institute + $200 for exit test). The estimated cost for endorsement of five teachers is $350 x 5 teachers = $1,750.

The district should also hire a consultant or regional representative in spring 2005 to work with ESL teachers to update and develop ESL materials. The district should designate two middle school and two high school ESL teachers to a team to work with the consultant during the summer or a non-instructional time and compensate them with a stipend of $1,145 for a five-day non-teaching period based upon the average teacher salary of $42,8983 divided by 187 instructional days to equal a $229 daily rate. The stipend for four teachers would equal $4,580 (4 x $1,145).

Consultant costs are based upon daily rates of $400 per day and the state rate of $80 a day for lodging and $30 a day for meals for a total of $510 a day for work in the district. The consultant should be reimbursed $400 a day for work completed off-site. A consultant should spend five days with the ESL teaching team, including delivery of a one-day program overview and training in materials preparation. In addition, the consultant should spend two days reviewing the resulting team-developed materials.

Five days of on site work at $510 a day + 2 days of off site review at $400 a day equal $3,350 (5 days x $510 a day) + (2 days x $400 a day) = $2,550 + $800 = $3,350. Initial costs for 2004–05 are $1,750 + $4,580 + $3,350 = $9,680.

In 2005–06, the consultant should spend two days a month (for nine months) on-site, monitoring program implementation and providing assistance to teachers throughout the year. The consultant should also spend five days off site reviewing program results, student progress, and providing program review information to the district. The consultant should, therefore, spend a total of 26 days helping the district review and modify its program to improve student performance: 18 days at $510/day and 5 days at $400 a day. Costs for 2005–06 equal (18 days x $510 a day) + (5 days x $400 a day) = $9,180 + $2,000 + $1,750 for an additional five teachers to obtain ESL endorsements in the second year of implementation equal $12,930. Costs for

2006–07, 2007–08, and 2008–09 are estimated at $1,750 for ESL endorsements of five additional teachers each year to increase the district's ESL teacher pool. Total five-year costs equal $27,860.

LIBRARY BOOKS (REC. 6)

Some of SSAISD's libraries do not meet state guidelines for the number of books available to students. From the fall of 1999 to the fall of 2003, SSAISD did not provide central funding for the purchase of books and materials for the libraries. This resulted in a decrease of the number of books on most campuses and an increase in the average age of the library collections. Some principals, however, used campus funds to purchase books and materials resulting in more current collections, while one school, Kazen Middle School received a Laura Bush Grant and purchased nearly 2,000 new books. Kazen Middle School was the only middle school in Texas to receive this library grant. In the fall 2003, the board amended the district's budget to include $69,200 for reading materials for all district libraries. This amendment indicated that this would be the first in a five-year plan. In addition the SSAISD board also approved $40,000 in funds as a one-time allocation.

Exhibit 1–17 shows the current number of books at each campus library and the resulting status based on Texas State Library and Archives Commission (TSLAC) standards. Out of fourteen campuses, five are considered *below standard* and three meet the *exemplary* criteria with the remaining falling into the *recognized* and *acceptable* categories.

For the five campuses with a *below standard* ranking, **Exhibit 1–18** lists the total number of books required for the libraries to be rated as *acceptable* the number of books currently at each library, and the number of additional books required to minimally meet the standard of *acceptable* based on TSLAC standards.

In addition to the number of books in a collection, the age also must be considered as a criterion for evaluation. TSLAC indicates that the *acceptable* average age of a collection is 15 years, the *recognized* standard is 13 years, and the *exemplary* standard is 11 years. Five campuses are currently rated as *below standard* in the average age of their collections using the TSLAC criteria, including both high schools. Although the South San Antonio High School meets the *acceptable* standard and South San Antonio High School West meets the *exemplary* standard for the number of books in their respective libraries, their collections are out of date. As a result, if books were removed to make the collections more appropriate, the number of available books would drop

EXHIBIT 1–17
SSAISD LIBRARY COLLECTIONS BY SCHOOL
MAY 2004

SCHOOL	*ENROLLMENT	NUMBER OF BOOKS	NUMBER OF BOOKS PER STUDENT	TSLAC LIBRARY STATUS
Armstrong Elementary	488	7,326	15.0	Below Standard
Athens Elementary	505	13,349	26.4	Exemplary
Benavidez Elementary	680	10,342	15.2	Below Standard
Carrillo Elementary	511	11,520	22.5	Recognized
Five Palms Elementary	408	8,355	20.5	Acceptable
Hutchins Elementary	551	10,981	19.9	Below Standard
Kindred Elementary	475	11,944	25.1	Exemplary
Palo Alto Elementary	633	11,168	17.6	Below Standard
Price Elementary	489	12,368	25.3	Exemplary
Royalgate Elementary	507	10,412	20.5	Acceptable
Dwight Middle	808	13,416	16.6	Acceptable
Kazen Middle	817	12,673	15.5	Below Standard
Shepard Middle	570	10,850	19.0	Recognized
South San Antonio High School	1,765	22,840	12.9	Acceptable
South San Antonio High School West	631	11,626	18.4	Exemplary

SOURCE: Texas Education Agency, PEIMS, 2003–04; SSAISD, Library Office, May 2004.
*NOTE: Enrollment based on campus submission averages for May 2004 and may not equal PEIMS submissions from spring 2004.

EXHIBIT 1–18
NUMBER OF BOOKS OF BELOW STANDARD SCHOOL LIBRARIES
MAY 2004

SCHOOL	NUMBER OF BOOKS FOR ACCEPTABLE STANDARD BASED ON ENROLLMENT	NUMBER OF BOOKS IN SCHOOL COLLECTIONS	NUMBER OF BOOKS BELOW ACCEPTABLE STANDARD
Armstrong Elementary	9,760	7,326	2,434
Benavidez Elementary	13,600	10,342	3,258
Hutchins Elementary*	11,020	10,981	39
Palo Alto Elementary	12,660	11,168	1,492
Kazen Middle	13,072	12,673	399
Total	60,112	52,490	7,622

SOURCE: SSAISD, Library Office, May 2004.
* Hutchins' collection is also considered below standard in regards to the age of books in the collection.

considerably. **Exhibit 1–19** shows the age and status of each campus library.

Collections dated at 1989 will drop to *below standard* in spring 2005 if there are no additional purchases, adding three more campuses, Palo Alto Elementary, Price Elementary, and Shepard Middle School, to the *below standard* category. Palo Alto is already rated as *below standard* in the number of books in the collection, while Price Elementary and Shepard Middle School are rated as *recognized.* In order to assure the quality of books and materials available meet student needs, many districts adopt policy and budget funds to keep the average age of collections current. Librarians in these districts remove outdated books systematically, as recommended by TSLAC, and replace them with new or current books.

Additionally, some districts use aggressive methods to procure funds for their library collections including the pursuit of grant funds or promoting innovate cooperative programs with local public or higher education libraries. One such program is the Read to Succeed License Plate Program in which $25 of the total $30 cost of a Texas license plate goes to the public library of the purchaser's choice for the purchase of educational materials. Some districts arrange to loan or borrow collections on a rotating basis with partner higher education institutional libraries. Another option to achieve higher status is to prioritize funding and aggressively meet identified standards through large purchases and then seek grant funding or increase budgeted funds for future purchases.

Exhibit 1–20 shows the number of books needed by each campus to meet each of the state's criteria from *acceptable* through *exemplary.*

SSAISD should improve school library collections to exceed *acceptable* standards and meet the state *recognized* standards at all campuses. The district should aggressively pursue innovative library funding and collection lending opportunities to supplement annual budgeted amounts. The district should begin planning to update its five-year library plan upon expiration based upon student enrollment with the long-range goal of budgeting one new book per

EXHIBIT 1–19
SSAISD SCHOOL LIBRARY COLLECTIONS BY AVERAGE AGE
MAY 2004

SCHOOL	AGE OF COLLECTION	TSLAC STATUS
Armstrong Elementary	1990	*Acceptable*
Athens Elementary	1990	*Acceptable*
Benavidez Elementary	1990	*Acceptable*
Carrillo Elementary	1992	*Recognized*
Five Palms Elementary	1991	*Recognized*
Hutchins Elementary	1988	*Below Standard*
Kindred Elementary	1988	*Below Standard*
Palo Alto Elementary	1989	*Acceptable*
Price Elementary	1989	*Acceptable*
Royalgate Elementary	1990	*Acceptable*
Dwight Middle	1988	*Below Standard*
Kazen Middle	1991	*Recognized*
Shepard Middle	1989	*Acceptable*
South San Antonio High School	1986	*Below Standard*
South San Antonio High School West	1984	*Below Standard*

SOURCE: SSAISD, Library Office, May 2004; and Follett Library Resources, April 2004.

EXHIBIT 1–20
BOOKS NEEDED TO MEET TEXAS STATE LIBRARY AND ARCHIVE COMMISSION STANDARDS

SCHOOL	NEW BOOKS NEEDED FOR TSLAC RATING		
	ACCEPTABLE	RECOGNIZED	EXEMPLARY
Armstrong Elementary.	2,434	3,410	4,386
Athens Elementary.	Meets Standard	Meets Standard	Meets Standard
Benavidez Elementary	3,258	4,618	5,978
Carrillo Elementary	Meets Standard	Meets Standard	744
Five Palms Elementary	Meets Standard	621	1,437
Hutchins Elementary	39	1,141	2,243
Kindred Elementary	Meets Standard	Meets Standard	Meets Standard
Palo Alto Elementary	1,492	2,758	4,024
Price Elementary	Meets Standard	Meets Standard	Meets Standard
Royalgate Elementary	Meets Standard	742	1,756
Dwight Middle	Meets Standard	1,128	2,744
Kazen Middle	399	2,033	3,667
Shepard Middle	Meets Standard	Meets Standard	550
South San Antonio High School	Meets Standard	1,870	5,400
South San Antonio High School West	Meets Standard	Meets Standard	Meets Standard
Total	7,622	18,321	32,929

SOURCE: Texas State Library and Archives Commission, School Library Programs, Standards, and Guidelines for Texas, 2004; and SSAISD, Library Office, May 2004.

student in average daily attendance each year. For this recommendation, the district should immediately designate funds to purchase books for districtwide collections raising campuses with *below standard* ratings to a *recognized* level and follow TSLAC process suggestions to create a schedule for collection review and update for all campuses.

This fiscal impact is based upon state-reported enrollment figures of 9,951 in spring 2004 and assumes the district will prioritize funding additional materials for campus libraries to meet the *recognized*

status. The 2004 average cost of a child or young adult book of $19.31 multiplied by the 18,321 books required for all campuses to meet the *recognized* standard equates to a total one-time cost of $353,779 ($19.31 x 18,321 = $353,779).

LIBRARY STAFFING (REC. 7)
SSAISD is understaffed with certified librarians and overstaffed with library clerks according to TSLAC *acceptable* standards. The district has replaced certified

librarians with library clerks at some campuses and does not meet TSLAC *acceptable* staffing standards.

Exhibit 1–21 shows the number of librarians and clerks assigned to campuses compared to the state's library guidelines for *exemplary* and *acceptable* standards.

Three campuses, Armstrong Elementary, Athens Elementary, and Royalgate Elementary, do not meet the *acceptable* TSLAC standard for the appropriate number of certified librarians with a collective need for 1.5 full-time equivalent librarian positions. Each of the three schools is staffed with a part-time librarian. Simultaneously, the district has 3.5 more clerks assigned to its libraries than recommended according to TSLAC standards.

SSAISD should hire additional certified librarians to at least meet the state *acceptable* standard. Librarians are instrumental in identifying and making resources available for students as they learn and for teachers as they teach. They also provide support in technology instruction and monitoring student skills. As a result of their specialized training, librarians are often supportive in instruction in the TEKS and help students to become accomplished readers, independent learners, critical thinkers, creative problem solvers, and informed citizens. If librarians are not present to help students and teachers, students are at risk of not receiving the most appropriate education, not having access to the most current information both in print and electronically, and not having the support to become self-sufficient learners.

This fiscal impact is based on the district bringing staffing to the *acceptable* standard. The fiscal calculation is estimated based upon a full-time equivalent librarian with four years experience at a daily rate of $195 for 202 days with fringe benefits of

EXHIBIT 1–21
SSAISD LIBRARY STAFFING COMPARED TO STATE GUIDELINES
NOVEMBER 2004

SCHOOL	*STUDENT ENROLLMENT	NUMBER AND TYPE OF LIBRARY STAFFING ALLOCATIONS	NUMBER AND TYPE OF STAFF NEEDED TO MEET EXEMPLARY STANDARD	NUMBER AND TYPE OF STAFF NEEDED TO MEET ACCEPTABLE STANDARD
Armstrong Elementary	488	0.5 Librarian 1.0 Clerk	1.5 Librarians 1.5 Clerks	1.0 Librarian 0.5 Clerk
Athens Elementary	505	0.5 Director serves as librarian 1.0 Clerk	2.0 Librarians 2.0 Clerks	1.0 Librarian 1.0 Clerk
Benavidez Elementary	680	1.0 Librarian 1.0 Clerk	2.0 Librarians 2.0 Clerks	1.0 Librarian 1.0 Clerk
Carrillo Elementary	511	1.0 Librarian 1.0 Clerk	2.0 Librarians 2.0 Clerks	1.0 Librarian 1.0 Clerk
Five Palms Elementary	408	1.0 Librarian 1.0 Clerk	1.5 Librarians 1.5 Clerks	1.0 Librarian 0.5 Clerk
Hutchins Elementary	551	1.0 Librarian 1.0 Clerk	2.0 Librarians 2.0 Clerks	1.0 Librarian 1.0 Clerk
Kindred Elementary	475	1.0 Librarian 1.0 Clerk	1.5 Librarians 1.5 Clerks	1.0 Librarian 0.5 Clerk
Palo Alto Elementary	633	1.0 Librarian 1.0 Clerk	2.0 Librarians 2.0 Clerks	1.0 Librarian 1.0 Clerk
Price Elementary	489	1.0 Librarian 1.0 Clerk	1.5 Librarians 1.5 Clerks	1.0 Librarian 0.5 Clerk
Royalgate Elementary	507	0.5 Librarian 1.0 Clerk	2.0 Librarians 2.0 Clerks	1.0 Librarian 1.0 Clerk
Dwight Middle	808	1.0 Librarian 1.0 Clerk	2.0 Librarians 2.0 Clerks	1.0 Librarian 1.0 Clerk
Kazen Middle	817	1.0 Librarian 1.0 Clerk	2.0 Librarians 2.0 Clerks	1.0 Librarian 1.0 Clerk
Shepard Middle	570	1.0 Librarian 1.0 Clerk	2.0 Librarians 2.0 Clerks	1.0 Librarian 1.0 Clerk
South San Antonio High School	1,765	1.0 Librarian 2.0 Clerks	3.0 Librarians 3.0 Clerks	1.0 Librarian 1.5 Clerk
South San Antonio High School West	631	1.0 Librarian 1.0 Clerk	2.0 Librarians 2.0 Clerks	1.0 Librarian 1.0 Clerk
Total Current Staff	*9,802	13.5 Librarians 16.0 Clerks	29.0 Librarians 29.0 Clerks	15.0 Librarians 12.5 Clerks

SOURCE: Texas Education Agency, PEIMS, 2003–04; and SSAISD, Library Office, November 2004.
*NOTE: Enrollment based on campus submission averages for May 2004 and may not equal PEIMS submissions from spring 2004.
NOTE: The director of Library Services serves the Alternative School on an as-needed basis.

10.4 percent, or $195 x 202 x 1.104 = $43,487. The fiscal impact divides the $43,487 in half ($43,487 / 2 = $21,744) to cover the cost of bringing the part-time position to full-time status. The $21,744 is then multiplied by the three current part-time librarians ($21,744 x 3 = $65,232). The annual cost for

implementation will be $65,232 with the first year of implementation in 2005–06 for a total five-year cost of $260,928.

For background information on Educational Service Delivery, see page 149 in the General Information section of the Appendices.

FISCAL IMPACT

RECOMMENDATION	2004–05	2005–06	2006–07	2007–08	2008–09	FIVE–YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
1. Design and implement a districtwide instructional program review based on the state's accountability measures and including administrative oversight.	($13,194)	($9,760)	($9,760)	($9,760)	($9,760)	($52,234)	$0
2. Purchase and/or update curriculum guides for all subject areas and courses offered.	$0	$0	$0	$0	$0	$0	($319,400)
3. Follow pre-referral procedures, provide staff development, and monitor referrals of Limited English Proficiency students as special education students.	$0	$0	$0	$0	$0	$0	$0
4. Evaluate current Career And Technology Education (CATE) courses and restructure offerings using an advisory panel.	$0	$0	$0	$0	$0	$0	$0
5. Increase the number of teachers with English as a Second Language (ESL) endorsements and modify the ESL program to include a parent information and student improvement plan.	($9,680)	($12,930)	($1,750)	($1,750)	($1,750)	($27,860)	$0
6. Improve school library collections to meet the state *recognized* standard.	$0	$0	$0	$0	$0	$0	($353,779)
7. Hire librarians to fully staff campus libraries to meet the state *acceptable* standard.	$0	($65,232)	($65,232)	($65,232)	($65,232)	($260,928)	$0
Chapter 1 Total	($22,874)	($87,922)	($76,742)	($76,742)	($76,742)	($341,022)	($673,179)

CHAPTER 2
BOARD GOVERNANCE

A seven–member SSAISD Board of Trustees oversees the management of the district. The board has five essential tasks:

1. Adopt an annual budget for the district and set a tax rate appropriate to fund it.

2. Adopt goals and priorities for the district and monitor success in achieving them.

3. Adopt policies that govern the district and review these policies for effectiveness.

4. Hire a superintendent to manage the district and evaluate the superintendent's effectiveness.

5. Ensure the community is kept informed about the district's actions taken in behalf of the community.

All board members are elected from single–member districts for three–year terms. The terms are staggered, and board elections are held annually on the first Saturday in May for approximately one–third of the board members.

FINDINGS
- The SSAISD board fails to provide appropriate leadership for the district, limiting the ability of the superintendent and staff to accomplish district goals and objectives.

- The current board structure does not provide school district constituents with at–large, districtwide school board representation.

- The board process for the selection of architects and contractors in construction projects has cost the district additional money, resulted in unsatisfactory projects, and did not foster public trust.

- The board process for the selection of professional and legal services has resulted in additional costs to the district and does not ensure that the most qualified and cost effective firms are selected.

- The board does not follow the recommended process to evaluate district superintendents as required by state law.

- SSAISD's board has not met individual and collective continuing education requirements set by the Texas State Board of Education (SBOE) regarding training, team building, and announcement of deficiencies, and does not have a process to effectively collect and monitor associated documents.

RECOMMENDATIONS
- **Recommendation 8: Assign a Texas Education Agency (TEA) board governance conservator and strengthen the existing Code of Ethics policy to limit board involvement in daily operations. (p. 30)** Because significant action is needed to change the pattern of board behavior along with community and staff perceptions about district actions, TEA should assign a governance conservator one day per week for one year to oversee districtwide governance and preside over monthly board meetings. The board should also adopt detailed language to the existing Code of Ethics policy limiting both collective and individual board involvement in districtwide daily operations and regularly self–monitor adherence to all aspects of new and existing board policies. By enacting these significant changes, the SSAISD board should provide appropriate leadership for and engage in appropriate interactions with district administrators, staff, students, and community members.

- **Recommendation 9: Reconstitute the board by creating two at–large positions and five single–member district positions. (p. 34)** The board should alter its composition to include two at–large positions, which promotes both districtwide and single–member district board representation and provides voters with the opportunity to elect three board members— two at–large and one single–member district. Changing to this type of board composition, which is similar to 56 other school districts in Texas, may help SSAISD's board members break the long–standing oppositional mindset, encourage more candidates to run for election, and facilitate a greater voter turnout.

- **Recommendation 10: Develop board policies and procedures that clearly define the board's role in procurements. (p. 35)** The board should take immediate steps to develop and implement a procurement policy that defines and limits its role to that of approval or disapproval of district staff or committee recommendations. Clearly defining the board's role in procurements will foster the perception that the selection process is independent and increase trust by the community in the board and the district as a whole.

- **Recommendation 11: Implement a formal selection process for attorneys and other professional service firms, including rankings by qualifications and mandate performance evaluations in subsequent formal agreements or contracts for services.** (**p. 38**) The board should direct the superintendent and director of Purchasing to research standards for selecting attorneys and other professionals similar to those outlined by organizations like the National Association of School Boards (NASB) in its publication, *Selecting and Working with a School Attorney: A Guide for School Boards.* The director of Purchasing and the superintendent should also develop performance measures for inclusion in contracts or formal agreements that allow the board and district administrators to evaluate professional performance. A formal selection process should allow the district to obtain the most qualified professional and legal services while controlling associated expenses.

- **Recommendation: 12: Develop a superintendent evaluation process that supports the accomplishment of district goals and meets the requirements of state law.** (**p. 39**) The SSAISD board president and board members should take immediate steps to comply with the Texas Administrative Code (TAC) by implementing the commissioner of Education's recommended process for evaluating the superintendent. An evaluation process that meets TAC requirements should bring SSAISD into compliance with state law and provide a clear and effective process for evaluating the superintendent according to defined expectations in performance and duties.

- **Recommendation 13: Develop and implement a tracking process to ensure that the board meets or exceeds individual member continuing education, team building, and announcement requirements.** (**p. 41**) The board president should ensure that all board members are aware of the continuing requirements and that members are offered multiple opportunities to meet these requirements. The board president and superintendent should develop a process to monitor both individual and collective board training that includes development and distribution of a calendar with multiple training opportunities from several sources and detailed steps outlining registration, attendance, reimbursement, and completion verification requirements. The calendar should also include the scheduled time for the announcement of

individual board member compliance with training requirements as outlined by law. By implementing and subsequently monitoring all aspects related to board training, the district ensures compliance with law, promotes collaborative and individual professional development, and mitigates the risk of inaccurate or disputed records.

DETAILED FINDINGS

BOARD LEADERSHIP (REC. 8)

The SSAISD board fails to provide appropriate leadership for the district, limiting the ability of the superintendent and staff to accomplish district goals and objectives. Current board members do not work together effectively and do not cooperate with the superintendent or district staff on many major issues such as budget development, creation of new positions, selection of principals, or evaluation of student performance. Instead, board members appear to compete with each other, the superintendent, and district staff.

These problems are not limited to the current board. The review team reviewed board minutes between 1997 and 2004 and identified similar problems in board minutes throughout the entire period. Board members, district staff, and community members said in interviews that these problems have existed for many years. They described school boards that for 30 years have been split along shifting majority (four of seven) / minority (three of seven) voting blocs of board members. According to interviews, district staff members have even given the process a name, "the South San Way."

Exhibit 2–1 lists the current board members by district, including their years of experience, profession or occupation, and term.

Listed below are examples demonstrating the board's lack of leadership that have been documented in board minutes and interviews conducted for this review with board members and school district employees.

- **Lack of cooperation among board members.** Board members in interviews referred to the current majority/minority split as a permanent way of doing business. When asked about the inability of board members to cooperate, members from both sides described an environment where there is little discussion of issues and few attempts to reach agreement. These majority/minority divisions do not apply to all issues brought before the board, but are documented in examples from board minutes relating to the bond construction program, redistricting, selection of attorneys and other

EXHIBIT 2–1
SSAISD BOARD MEMBERS
JULY 2004

DISTRICT NUMBER	MEMBER	YEARS OF EXPERIENCE	PROFESSION	END OF TERM
1	Manuel R. Lopez, Vice President	7	Police Officer	2006
2	Trinidad T. Mata	6	Air Conditioning Repair	2007
3	Homer Flores	*	Retired	2005
4	Jamie A. Gallegos, Secretary	1	Mechanic	2006
5	Connie Prado	6	Executive Assistant	2007
6	Cyndi A. Ramirez	4	Paraprofessional	2006
7	David E. Carreon, President	2	Supervisor	2005

SOURCE: SSAISD, Superintendent's Office, July 2004.
*NOTE: Homer Flores, appointed in July 2004 to fill a board vacancy, previously served on the board from 1996 to 1999.

professional services, and the performance of the superintendent. Board minutes also documented personal attacks between members and the use of quorum requirements to prevent, limit, or end discussion of agenda items. For example, in the July 30, 2003 special called meeting to address three agenda items, two of five members excused themselves from the meeting for items one and two, creating a situation of no quorum. The excused members rejoined the board for discussion of the third agenda item. As a result, the board could not take action on items one and two for lack of a quorum.

Board members periodically file complaints with TEA regarding the behavior of other board members. The lack of cooperation reached such a level that the board adopted a local policy, BE (LOCAL), on August 25, 2003, that allows the board president to admonish board members that are disruptive and then eject them, if necessary, from the meeting. This policy is published with each board meeting agenda.

Board members described other members of the board as not acting in good faith and lacking concern for students and the district as a whole. The 2003–04 board president said that the board's majority/minority way of doing business was the way all school boards work. Another board member stated that there was no possible way that the members of the board could ever work together. An official from the Texas Association of School Boards (TASB) who has worked with the district on board governance for more than 10 years described the board's problems as intractable or not easily cured.

▪ **Inability to work effectively with the superintendent and district staff.** In May 2004, the district needed to replace four principals at South San Antonio High School, Kazen Middle School, the Alternative School, and Benavidez Elementary School. In July 2004,

the elementary school principal at Five Palms Elementary resigned, creating an additional vacancy. By August 4, the board had not approved two district staff recommendations for the high school principal and two recommendations for the Benavidez Elementary principal, and had not filled additional vacancies at South San Antonio High School, including four assistant principals, two guidance counselors, and the band director. On August 16, after students had already returned to school for the start of the 2004–05 year, the board approved staff to fill the high school and two elementary school principal vacancies. However, students continued to attend school during the first and second weeks of the year with interim staff. Often, principals are key participants in decisions regarding assistant principals at their schools. All of the key positions remained vacant due to the delays in hiring and actual placements of the new principals. As of August 23, 2004, the district was unable to fulfill the high school principal vacancy as offered on August 16 to the approved candidate and again went through the approval process as students and staff continued in the educational process lacking adequate and permanent campus leadership.

Despite leaving key positions open throughout the summer, the board expressed significant concerns regarding the district's performance on the spring 2004 administration of the Texas Assessment of Knowledge and Skills (TAKS). Secondary student performance on the 2003–04 TAKS in science and math was approximately 20 points behind that of students statewide.

Summer months are critical planning periods for schools. Principals and campus staff use this time to review student performance data and to identify and prioritize areas of need. By not filling the principal position responsible for two–thirds of the district's high school students, the board limited the ability of the district and campus staff to proactively address student

performance issues, including professional development needs, additional campus administrative and professional vacancies, and teacher assignments during the summer months. In September 2004, TEA notified district officials that South San Antonio High School was one of 1,999 campuses statewide that failed to meet federal No Child Left Behind Adequate Yearly Progress for the second year in a row. As a result, the district was required to immediately notify parents that they may transfer their student to another public school with transportation expenses paid by SSAISD.

- **Interference in administrative and campus operations.** In October 2001, the TEA School Governance Unit investigated board governance based on board member complaints. The investigation's report found a lack of understanding of the board's roles and responsibilities that clearly indicated governance problems. The report found that conflict and distrust existed between some board members. Additionally, TEA's report noted, "there is a persistent tendency for board members to act outside the scope of their authority." TEA required a number of improvement actions, including board training and the submission of board meeting agendas, minutes, and audiotapes to the TEA School Governance Unit. The board attended the required training and implemented policies BBE (LOCAL) to clearly define board member roles. According to interviews with the board and senior staff, both board members and staff felt that overall board member relations have improved since the 2001 TEA investigation. However, interviews with campus staff indicated that individual board members have continued through May 2004 to contact staff regarding student discipline and employee job conduct.

During the June 9, 2004 board meeting, district staff presented student performance information from the spring 2004 administration of the TAKS. TEA releases the initial results directly to districts and finalizes them after combining spring and summer results, investigating any protested results, and re–verifying student performance. After the initial staff presentation of these student performance results, two board members offered their own presentations of student performance data that differed from staff presentations. The board then voted, without discussion or explanation, not to extend the superintendent's contract. The newly elected board president abstained from the vote.

- **Disruption of budget efforts.** There is no common vision, understanding, or agreement among board members and district administrators regarding the district, its facilities, resources, teachers, or number and organization of administrators. After adoption of the annual budget in August 2001 for example, the board continued to approve raises for selected categories of staff. During a special called meeting on October 10, 2001, the board voted for additional pay raises of $.50 per hour for pay grade 1A positions (food service worker, manual trades, and custodians) and pay grade 1 positions (food service worker and custodians).

During the 2003–04 budget process, there were several workshop sessions held to review and discuss the budget. Board members waited until the August 25, 2003 meeting, scheduled for adoption of the 2003–04 budget, to offer separate budget presentations from the two different blocs of board members.

During this same budget process, the board eliminated funding of the math and science director (instructional specialists) positions,

EXHIBIT 2–2
SSAISD TEACHER SURVEY RESPONSES—
DISTRICT LEADERSHIP, ORGANIZATION, AND MANAGEMENT
MAY 2004

THE SCHOOL BOARD HAS A GOOD IMAGE IN THE COMMUNITY.	
RESPONSE	TEACHERS (N=340 OF A TOTAL 670 SAMPLE)
Strongly Agree	1.5%
Agree	11.8%
No Opinion	23.5%
Disagree	33.5%
Strongly Disagree	27.1%
No Response	2.6%

SOURCE: Legislative Budget Board, SSAISD Surveys, May 2004.
NOTE: Responses may not add to 100 percent due to rounding.

although math and science had been identified as areas of greatest need after the new TAKS assessment. The board cited budget reasons for the funding reductions, although the district had and continues to have a fund balance that is in excess of the optimum fund balance standards developed by TEA.

Although the board has a Code of Ethics, board policy BBF (LOCAL), that establishes board roles and governance principles, the board does not follow its own policy. The examples outlined in the aforementioned bullets point to long–standing problems in board governance and cooperation. By failing to work together and with the superintendent and staff on many important matters, the board reduces its effectiveness and decreases its standing in the community.

Exhibit 2–2 lists the responses of 340 out of approximately 670 district teachers to the statement, "The school board has a good image in the community." Sixty percent of the teachers who responded disagreed or strongly disagreed with this statement and 13 percent agreed or strongly agreed

with the statement.

Twenty–six of 37 principals and assistant principals who responded answered in a similar manner to the statement, "School board members understand their role as policymakers and stay out of the day–to–day management of the district." As shown in **Exhibit 2–3**, 46 percent of principals and assistant principals who responded to this statement disagreed or strongly disagreed with the statement, while 19 percent who responded agreed with the statement.

These responses are in sharp contrast to the responses to the survey statement regarding the leadership of the superintendent—both as an instructional leader and as a business manager. As shown in **Exhibit 2–4**, 88 percent of principals and assistant principals, 74 percent of teachers, 54 percent of parents, and 62 percent of administrators and support staff who responded to the surveys agreed or strongly agreed with the statement, "The superintendent is a respected and effective instructional leader."

Exhibit 2–5 shows a similar response to the

EXHIBIT 2–3
SSAISD PRINCIPAL AND ASSISTANT PRINCIPAL SURVEY RESPONSES—
DISTRICT LEADERSHIP, ORGANIZATION, AND MANAGEMENT
MAY 2004

SCHOOL BOARD MEMBERS UNDERSTAND THEIR ROLE AS POLICYMAKERS AND STAY OUT OF THE DAY–TO–DAY MANAGEMENT OF THE DISTRICT.	
RESPONSE	**PRINCIPALS (N=26 OF 37 TOTAL SAMPLE)**
Strongly Agree	0.0%
Agree	19.2%
No Opinion	30.8%
Disagree	19.2%
Strongly Disagree	26.9%
No Response	3.8%

SOURCE: *Legislative Budget Board, SSAISD Surveys, May 2004.*

EXHIBIT 2–4
SSAISD SURVEY RESPONSES—
DISTRICT LEADERSHIP, ORGANIZATION, AND MANAGEMENT
MAY 2004

THE SUPERINTENDENT IS A RESPECTED AND EFFECTIVE INSTRUCTIONAL LEADER.				
	PRINCIPALS (N=26)	**TEACHERS (N=340)**	**PARENTS (N=39)**	**ADMINISTRATORS/STAFF (N=282)**
Strongly Agree	46.2%	20.0%	7.7%	23.8%
Agree	42.3%	54.1%	46.2%	38.7%
No Opinion	3.8%	14.1%	28.2%	23.4%
Disagree	0.0%	6.5%	10.3%	7.8%
Strongly Disagree	3.8%	2.1%	5.1%	3.9%
No Response	3.8%	3.2%	2.6%	2.5%

SOURCE: *Legislative Budget Board, SSAISD Surveys, May 2004.*
NOTE: *Responses may not add to 100 percent due to rounding.*

statement, "The superintendent is a respected and effective business manager." Eighty–eight percent of the principals and assistant principals who responded agreed or strongly agreed with the statement, while no one disagreed with the statement. Sixty–six percent of teachers who responded, 44 percent of parents who responded, and 60 percent of administrators and support staff who responded agreed or strongly agreed with the statement.

Actual survey responses from participants most frequently referenced board conduct. The comments were almost all negative and included statements that questioned the honesty of board members, noted their inability to work together to the detriment of the students, and identified their constant power struggles. There have been numerous articles and editorials in the San Antonio papers criticizing the board and their conduct in elections, their oversight of the district's bond programs, failure to renew the superintendent's contract, and delays and failure to accept recommendations from staff to fill principal vacancies in lieu of approving their own appointments to some of these positions.

Effective school boards may disagree on matters brought before them, but always work together for the common good of the district. Effective school boards have a vision or understanding of what different pieces of the system—facilities, resources, teachers, administrators, and community—will look like in the future. Effective board members do not act independently but as a cohesive whole, drawing from individual strengths for the collective good of the district. They do not surprise district staff or other board members with presentations or sudden agenda deviations during meetings. They conduct themselves in the manner in which they were elected—to serve all children in the district, not just certain communities. Effective board members model the behavior they want to see displayed in schools and follow the principles outlined in their Code of Ethics. They also perform regular self–

assessments.

Because significant action is needed to change the pattern of board behavior and community and staff perceptions about district actions, TEA should assign a governance conservator one day per week starting January 2005 to oversee districtwide governance and preside over monthly board meetings at a cost of $560 per day or a total of $14,560. The board should also adopt detailed language to the existing Code of Ethics limiting both collective and individual board involvement in districtwide daily operations, and regularly self–monitor adherence to all aspects of new and existing board policies. The policy wording should be strengthened to outline the board's responsibility as policy makers and not administrators. It should also identify appropriate and inappropriate actions. By enacting these significant changes, the SSAISD board should provide appropriate leadership for and engage in appropriate interactions with district administrators, staff, students, and community members.

The fiscal impact estimates SSAISD will need to budget $560 per day for one day each week beginning January 2005, a total cost of $14,560 ($560 x 26 weeks = $14,560). The district will only need a conservator two days out of each month during the second year ($560 x 26 weeks = $14,560).

BOARD STRUCTURE (REC. 9)

The current board structure does not provide school district constituents with at–large, districtwide school board representation. Few constituents participate in SSAISD elections, and overall participation is declining. As of June 2004, 23,972 registered voters live in the boundaries of the district. **Exhibit 2–6** lists the voter turnout in recent elections. During the recent June 12, 2004 bond election, only 243, or approximately 1 percent, of the registered voters participated in the election. For example, a comparison of the voter turnout in the 2002 bond election to the voter turnout in the 2004 bond

EXHIBIT 2–5
SSAISD SURVEY RESPONSES—
DISTRICT LEADERSHIP, ORGANIZATION, AND MANAGEMENT
MAY 2004

THE SUPERINTENDENT IS A RESPECTED AND EFFECTIVE BUSINESS MANAGER.				
	PRINCIPALS (N=26)	TEACHERS (N=340)	PARENTS (N=39)	ADMINISTRATORS/STAFF (N=282)
Strongly Agree	42.3%	18.2%	5.1%	20.9%
Agree	46.2%	47.9%	38.5%	39.0%
No Opinion	7.7%	22.9%	35.9%	28.7%
Disagree	0.0%	5.3%	15.4%	6.0%
Strongly Disagree	0.0%	2.6%	2.6%	2.5%
No Response	3.8%	2.9%	2.6%	2.8%

SOURCE: Legislative Budget Board, SSAISD Surveys, May 2004.
NOTE: Responses may not add to100 percent due to rounding.

EXHIBIT 2–6
SSAISD VOTER TURNOUT
1998 THROUGH 2004

ELECTION	VOTER TURNOUT
1998 Board of Trustees Election, May 2, 1998	1,680
1999 Board of Trustees and School Bond Election May 1, 1999	2,098
2000 Board of Trustees Election, May 6, 2000	1,524
2001 Board of Trustees Election, May 8, 2001	1,679
2002 Board of Trustees Election, May 4, 2002	1,034
2002 School Bond Election, June 8, 2002	561
2003 Board of Trustees Election	1,399
2004 Board of Trustees Election, May 15, 2004	1,322
2004 School Bond Election, June 12, 2004	243

SOURCE: SSAISD, Board Minutes, May 1998 through June 2004.

election shows a decline of 57 percent.

In Texas, there are 56 school districts that combine single–member with at–large representatives for their governing boards. Many boards, regardless of their composition, strive to collaborate and encourage voter turnout in efforts to best represent the students, families, and community members districtwide.

Under §11.052(a) of the Texas Education Code, the school board may decide that no fewer than 70 percent of the members of the board, or five positions, are to be elected from single–member districts, with the remaining two members elected from the district at–large. The board must hold a public hearing at which registered voters of the district have an opportunity to comment on the order. The board must publish notice of the hearing in a newspaper that has general circulation in the district at least seven days before the hearing date. This order must be entered no later than 120 days before the first election date at which all or some of the board members are elected.

The board should alter its makeup to include two at–large positions, which promotes both districtwide and single–district board representation and provides voters with the opportunity to elect three board members—two at–large and one single–member district. Changing to this type of board composition, which is similar to 56 other school districts in Texas, may help SSAISD's board members break the long–standing oppositional mindset, encourage more candidates to run for election, and facilitate a greater voter turnout. Board elections should be held in conjunction with scheduled November or May elections to minimize one–time costs to an estimated $12,000 for reconfiguration of districts and to maximize voter turnout.

BOARD PROCESS IN BOND PROGRAMS (REC. 10)

The board process for the selection of architects and contractors in construction projects has cost the district additional money, resulted in unsatisfactory projects, and did not foster public trust. For a period of years, the board has made its own selections regarding professional services contracts such as architects, construction project managers, and contractors, with limited reliance on district staff recommendations. The board, in at least one instance, also selected contractors that were not recommended by district staff. The review team looked at the contracting process for professional services contracts, including the selection processes in place during the 1999 and 2002 bond construction programs.

During 1998, the associate superintendent for Student /Support Services, since retired, and an outside architect completed a facilities needs assessment that identified an estimated $97 million in renovations and new facilities. This document formed the basis for the bond elections in 1999 and 2002 and is no longer available in the district according to interviews from some district staff. The current superintendent and the executive director for Business and Finance Services said in interviews that they have heard about the assessment but never seen the document. The review team received and reviewed an assessment completed by an outside firm from September 1998 through 2000 that documented $9.6 million in renovation needs.

In 1999, the board began the first of three bond construction programs to address these needs and provide new classroom capacity. All of these programs are partially funded by the Instructional Facilities Allotment Program (IFA). This state program provides financial support, according to a weighted system primarily designed to assist property poor districts, for renovations and new construction

of instructional facilities. Voters in local districts approve a school bond program, and the state provides significant funding over the life of the bonds used to finance the qualified projects. The amount of state funding varies each year but has ranged from 78 to 84 percent during the five years that SSAISD has participated in the program.

The voters approved a $35 million bond in 1999 by a margin of 64 percent (1,333 votes) to 36 percent (765 votes) to build a new elementary school, construct additions to current schools, and renovate existing buildings. In 2002, voters approved a second school bond program for $35.5 million to build a new middle school and for additions and renovations to existing schools. In 2004, voters approved a portion of the $50.5 million in proposed bonds. Voters approved Proposition 1, the IFA-supported portion of the proposed bonds for $40.5 million in new construction, additions, and further renovations, by 30 votes (136 for passage and 106 against passage). Proposition 2, containing non–IFA bonds, was defeated by three votes (120 for and 123 against). The district, however, did not receive state IFA funding for the 2004 bond.

The board selected Lopez and Lopez, Architects, Inc., to design the 1999 bond projects at a fee of 7 percent of the actual construction costs. District staff did develop a Request for Qualifications (RFQ), but neither the staff nor community participated in the selection process. The architect selection process has been described in interviews with current staff as a closely held process between the board, the now retired superintendent, and the now retired associate superintendent for Student/Support Services. The board held a similar process for the selection of the project manager, 3D/International, at a cost of $1.25 million. Neither of the selections is required to be competitively bid under Texas law.

After the selection of the architect, the superintendent established an ad–hoc bond committee of 19 members that included the superintendent, the associate superintendent for Student/Support Services, the director of Business Services, the Purchasing agent, and 15 members selected by board members to provide community

input. The committee's function was to serve as a liaison during construction and to meet with the architect upon request. The committee met several times with the architect regarding the construction projects.

The board–selected project manager competitively bid the construction projects. **Exhibit 2–7** shows the results of two projects where the competing companies were similarly ranked in regards to quality, but the board selected the higher bid. According to the bid summary sheets prepared by the project manager for the renovation project of four schools, Athens Elementary, Armstrong Elementary, Five Palms Elementary, and Kazen Middle, Affirmed General Contracting was ranked 96 out of 100 and Associated Able Companies was ranked 91 out of 100 based on an evaluation of their qualifications. The board awarded the contract to Affirmed General Contracting Inc., although its bid was $360,000 higher than the bid from Associated Able Companies. In addition, there is no indication in board minutes to identify if the superintendent or district staff made any associated recommendations to the board.

The district received three bids for a second project to provide renovations to South San Antonio High School. The two lowest bidders had the same qualification ranking—50 points out of a possible 50 points—yet the board selected a firm that submitted a bid $102,000 higher than the other firm.

The 1999 bond program is largely complete except for meeting some Americans with Disabilities Act (ADA) requirements and certain heating and air conditioning design issues. As early as December 2002, the board held a special called meeting to address concerns by the principals regarding deficiencies in these construction projects. As of August 2004, the district was working with its attorneys to consider a lawsuit to address the missing ADA requirements.

An architectural firm provided an abbreviated needs assessment consisting of a one–page summary and a list of needs from each principal for the 2002 bond program. These needs were not ranked nor were

EXHIBIT 2–7
SSAISD 1999 BOND CONSTRUCTION PROJECTS

DESCRIPTION	LOW BIDDER	SUCCESSFUL BID	SUCCESSFUL BIDDER
Renovations to South San Antonio High School	$6,928,000	$7,030,000	Affirmed General Contracting, Inc.
Renovations to Athens, Armstrong, Five Palms Elementary Schools and Kazen Middle School	$7,740,000	$8,100,000	Affirmed General Contracting, Inc
Total	$14,668,000	$15,130,000	
Difference		$462,000	

SOURCE: SSAISD, Bid documents and contracts, May 2004.

associated costs identified. This program includes construction of a new middle school, a new Community Learning Center, and additions and renovations to existing schools. For this program, the newly hired superintendent, Dr. Cortez, established a bond committee early in the process, including members not appointed by the board and with a role beyond several meetings initiated by a board–appointed architect. The committee consisted of 41 members, including the superintendent, three board members, administrators, principals, and parents. This committee served a more active role and participated in the selection of the architects for the construction projects more so than the previous bond committee. District staff developed an RFQ for architect services that was advertised during February 2003. The bond committee reviewed the responses and developed a short list. The bond committee interviewed the firms on the short list during March 2003.

At the March 6, 2003 special called board meeting, the superintendent presented a list of architects for each of the three phases of the 2002 construction program. The list for each phase included a short list of five architects that, according to the board minutes, "The committee ranked based on their strengths and weaknesses for each phase as evaluated and determined by the committee." At the meeting the board approved a motion to select an architect for Phase I that was not on the Phase I list. After a recess, a discussion, and a second recess, the superintendent modified his recommendation to include five firms for all phases of the program. The board then voted to select architects for each phase of the 2002 bond construction project as follows:

- Phase I – An architect not on the original list for Phase I;

- Phase II – An architect identified on the short list for Phase II; and,

- Phase III – An architectural firm not on the short list for Phase III, not on the short list for any of the three phases and one that did not even propose for the work in Phase III. The board then voted to rescind this vote and voted to award the Phase III work to a firm that was on the short list for all three phases.

The board continued to review the selection of architects for the 2002 Bond Program during the rest of March and part of April 2003. At the regular board meeting on March 26, 2003, the board considered correspondence from a firm that was not selected during the closed session. In open session the board voted to table the discussion and possible action until a later date. At a special called meeting

on April 2, 2003, the board considered the selection of architects during a closed session. In open session the board voted to adjourn without taking action after a motion to send the selection process back to the bond committee failed on a 3–3 vote. A special called session to approve the architects for Phase I and Phase II was cancelled and rescheduled for April 10, 2003. The special called meeting on April 10 failed to meet due to lack of a quorum. At the regular meeting on April 16, 2003, the board voted to approve the contract as voted on earlier. There is no indication in the minutes regarding any district staff recommendations.

The board also made its own selection in at least one major repair project. In November 2001, the district accepted competitive bids for the repair of Five Palms Elementary School parking lots. The district received nine sealed bids, ranging in price from $84,730 to $168,000. District staff recommended award to a company with a bid price of $84,730, the lowest bid. This contractor had also successfully completed work for the district in the past. The board did not accept the staff recommendation and voted unanimously to award the project to a different firm for a bid price of $135,000, the second highest of the nine bids. This bid was 59 percent higher than the bid recommended by the district staff. There is no discussion in the board minutes regarding the reasons for the board's action.

The low bidder on that project challenged the award in a letter to the superintendent at that time, Dr. Zamora, on November 15, 2001. During the regular board meeting on December 19, 2001, the board voted unanimously to rescind the contract award and re–bid the project. After the re–bidding process, district staff recommended the contract be awarded to the lowest bidder for a price of $80,374.25. At the regular board meeting on February 20, 2001, the board unanimously voted to award the contract to this firm.

Extensive board participation in major procurements fosters a perception that the selection process is not independent and lessens community trust in the board and the district as a whole.

To maintain independence and avoid the perception of favoritism or conflict of interest, many government organizations adopt policies that define the role of elected governing boards be subject to approval. The board does not actively participate in the evaluation or selection of a vendor, but relies on the technical staff and the procurement officer of the organization to evaluate and make the recommendation of award based on a scoring of published evaluation criteria in the solicitation document. The governing board weighs the staff's

recommendation and then makes the award. In the interest of open government, if the board does not agree with staff recommendations, the board states publicly the reasons for not selecting the recommended vendor.

The American Bar Association has set out effective procurement roles and responsibilities for elected officials in *The 2000 Model Procurement Code For State and Local Governments.* This model code defines a process to ensure award of all contracts for architectural and engineering services on the basis of demonstrated competence and qualification for the type of services required at fair and reasonable prices. The process includes the public announcement of all requirements and the use of a selection committee to evaluate and rank no less than three firms to be considered. The organization's procurement officer then negotiates a contract with the highest qualified firm at a fair and reasonable price. After negotiations are concluded, the negotiated contracted is presented to the governing body for approval. The governing body may approve or disapprove the contract. If the contract is disapproved, the project is returned to the selection committee for further work.

The board should take immediate steps to develop and implement a procurement policy that defines and limits its role to that of approval or disapproval of district staff or committee recommendations. Individual board members may participate in the evaluation process to gain an understanding of the procurement, but should refrain from voting for the recommendation up for selection as part of the evaluation committee.

The board should direct the superintendent to develop a procurement policy for its review. The superintendent should then appoint the director of Purchasing to develop a draft policy based on procurement best practices. The policy should outline the roles and responsibilities and expected ethical conduct of district staff, outside evaluators (as appropriate), and the board during the procurement selection and award process. Specifically the policy should include the following statements:

- The board's role is that of approval or disapproval of staff recommendations. The board agrees to publicly state reasons for disapproving staff recommendations. Any participation in the evaluation stage shall be on a non–voting, solely observational basis. The board shall adhere to the same ethics requirements as voting evaluation committee members.

- Evaluation committee members shall be required to sign disclosure statements identifying any potential conflicts of interest with proposers before the evaluation commences and shall certify confidentiality during the evaluation process.

- The director of Purchasing shall participate and supervise the evaluation committees for professional services and construction to ensure that processes are conducted fairly and that proposals are evaluated against published criteria.

- The director of Purchasing as well as the superintendent or other district staff shall participate in negotiations for the procurement of professional services. The role of attorneys is limited to providing legal advice and counsel to construct the contract document.

The director of Purchasing should research other state and local governments' purchasing policies and procedures to identify best practices for the procurement of professional services and construction. Once the policy has been developed, the director of Purchasing should present it to the superintendent for review and comment. The director of Purchasing can then incorporate any feedback from the superintendent into a final draft for submission to the board for adoption. The district should then publish the adopted policy on its website.

ATTORNEY AND PROFESSIONAL SELECTION AND FEES (REC. 11)

The board process for the selection of professional and legal services has resulted in additional costs to the district and does not ensure that the most qualified and cost effective firms are selected. District staff described the selection of attorneys for the district as the sole province of the board. The board has changed attorneys four times since 1998 without following a standard selection process.

At a March 3, 1998 meeting, the board dismissed its law firm and simultaneously hired an in–house attorney. On December 9, 1998, the board then dismissed the in–house attorney and rehired the previous law firm at the same meeting. On June 16, 2000, the board dismissed that law firm and hired a new firm for legal representation at the same meeting. On May 21, 2002, following the May 9 board election, this firm was dismissed and the current firm of Gale, Wilson and Sanchez was hired, again at the same meeting. During this special called meeting the board voted to change attorneys, rescinded a vote taken to select architects for future bond projects made on April 19, 2002, selected projects for the 2002 bond program, selected bond counsel for the district, and amended the 2002 bond

election early voting procedures. The meeting lasted one hour. The only staff recommendations considered in the voting was the selection of projects for the 2002 bond election.

By failing to use a standard process to identify and select attorneys, the board has also failed in its oversight responsibilities. The district's 2002–03 legal expenses at $15.81 per student are higher than the overall state average of $11.07 per student. **Exhibit 2–8** lists legal fees paid by the district during the last four years, from 2000–01 through August 2003–04. Legal fees, according to district administrators and representatives from the district's legal firm, have not decreased since 2002 but have increased due to several federal lawsuits against the district and other ongoing litigation. During review of attorney invoices for the past two years, the review team found instances where the district was charged for an entire day of legal research at a cost of $1,000

and trust are also important. In evaluating attorneys, NASB identifies standards to be met with regard to ethics, experience, and quality of legal services.

In managing and controlling legal fees, other Texas school districts such as Brownsville ISD effectively control legal services by requiring weekly reports of hours incurred to the superintendent's office and placing limits on the number of hours incurred in a given month. This district requires the attorney, according to the contract, to obtain special permission from the superintendent's office when the attorney anticipates that the hours in any given month will exceed 130. The Superintendent's Office closely monitors legal bills and notifies the attorney if it does not receive a weekly report. The process has allowed the district to obtain professional legal representation while controlling the amount expended on legal fees.

EXHIBIT 2–8
SSAISD ATTORNEY FEES
2000–01 THROUGH AUGUST 2004

YEAR	FEES	ATTORNEYS
2000–01	$184,619	Quinlan, Dilley, Dilley, and Mead
2001–02	$140,546	Quinlan, Dilley, Dilley, and Mead; Gale, Wilson, and Sanchez; and Walsh, Anderson, and Brown (special education attorneys)
2002–03	$156,946	Gale, Wilson, and Sanchez
2003–04*	$164,967	Gale, Wilson, and Sanchez

SOURCE: SSAISD, Business and Finance Services Department, April 2004, and Gale, Wilson, and Sanchez, September 2004.
*NOTE: Actual expenses through August 2004, balance estimate based on average monthly billings in 2003–04 and board budget amendments.

charged for private investigators—although they were not authorized by district staff—and paid $34,421 for redistricting to the district's law firm at that time, although the Alamo Area Council of Governments prepared the actual maps at a cost of $975 to the district.

Some districts avoid abrupt changes in professional services providers such as attorneys, architects, or insurance providers without incorporating staff recommendations, having documented the provisions of unacceptable performance, or using a viable process to identify and select qualified replacements to mitigate any perception that the awarding of the contract is a personal decision of board members. These districts avoid the possibility of particularly acute misperceptions if and when replacements take place immediately following board elections.

In *Selecting and Working with a School Attorney: A Guide for School Boards*, the National Association of School Boards (NASB) sets out a recommended process for hiring, managing, and evaluating school attorneys. NASB identifies that the most important factor in hiring legal counsel is experience in the area of school law. Qualitative factors such as board comfort

The board should direct the superintendent to research standards for selecting professional services similar to those outlined by NASB. The superintendent should work with the director of Purchasing to establish a process for procuring professional and legal services. The process should outline minimum qualifications such as substantive experience in school law or related professional standards. It should also require firms to present their fee structures and proposals to work with the district to control costs that will be incorporated into the contract. Finally, the director of Purchasing and the superintendent should develop performance measures to be included in any formal agreements or contracts that allow the board and district administrators to evaluate attorney performance.

SUPERINTENDENT EVALUATION (REC. 12)
The board does not follow the recommended process to evaluate district superintendents as required by state law. The SSAISD school board has not conducted at least the last three superintendent evaluations in compliance with state regulations. The board's evaluation of the superintendent is a critical tool in the overall governance process. It serves to

establish and articulate district goals and priorities. The evaluation is also the board's primary means of holding the administration accountable for performance. The board has failed to perform this critical duty properly for the two evaluations of the current superintendent and, at least, the last evaluation of the previous superintendent. In June 2004, the SSAISD board voted not to extend the contract of the current superintendent. Board members cited poor test scores and time spent traveling as concerns. This action was taken without discussion among board members or with the superintendent.

Chapter 21 of the Texas Education Code (TEC) sets out major statutory provisions that school boards must follow in evaluations of the district superintendent. The statutes provide for a written evaluation of the superintendent at least annually based on a process authorized by the commissioner of Education. The board may use this process or develop its own. If it chooses to use it own process, it must do so in consultation with the statutorily prescribed district planning committee and campus–level planning committees (TEC §21.354).

The commissioner's rules appear in Chapter 19 of the Texas Administrative Code (TAC). The evaluation must include three steps: (1) setting goals that define expectations and priorities for the superintendent; (2) at least one formative conference, or interim meeting, where the board and superintendent measure progress in meeting expectations and discuss ideas for improving performance; and (3) an evaluation conference, where an instrument is completed summing up performance for the year, and that assessment is discussed (19 TAC §150.1022(a)). These steps must be included in an annual calendar for appraisal developed by the board in consultation with the superintendent (19 TAC §150.1022(a)). The superintendent must be involved in developing the evaluation tool or the evaluation process (19 TAC §150.1022(b)). The board must have been trained in the appropriate evaluation skills (19 TAC §150.1022(c)). TASB recommends that school boards first conduct a self-assessment of its own performance before evaluating the superintendent' performance.

The current superintendent was hired effective June 29, 2002 and attended his first board meeting on July 11, 2002. All board members, including three of the six board members in office on August 4, 2004, unanimously selected him. Training for the governance team began on August 7, 2002 with a team building and self–assessment session led by a TASB facilitator. The process followed for the

evaluation of the current superintendent included the following:

- The board received training on superintendents' evaluation goals on January 14, 2003. A TASB facilitator also led this session. The session scheduled for February 17, 2003 did not take place due to a lack of a quorum. An additional session scheduled for March 3, 2003 was cancelled.

- During fall 2002, the superintendent developed an evaluation instrument setting out his goals.

- In April 2003, the superintendent provided an evaluation instrument for 2002–03 to each board member.

- Individual board members completed the instruments.

- On May 2, 2003, in a special called meeting regarding the evaluation of the superintendent, the board, according to the board minutes, "agreed to turn evaluation of the superintendent over to the attorney to tabulate. The attorney will advise the superintendent when tabulation is done and he will either send the information to the board of trustees or set a date on the agenda for the board to discuss the evaluation in closed session." The superintendent was not advised by the board or school attorney about a board motion to set a future meeting to discuss evaluation. The meeting lasted 12 minutes. No other meetings were held during 2002–03 to evaluate the superintendent.

- During March 2004, an evaluation instrument was again provided to board members. Four members completed and signed individual instruments. Three members submitted unsigned forms. The attorney tabulated the forms and provided the individual evaluations and a summary to the superintendent and the board.

- On June 9, 2004, the board voted not to extend the superintendent's contract. According to a board member at the meeting there was no discussion prior to the vote regarding the superintendent's performance.

The superintendent stated in interviews that the board has not held meetings to evaluate his performance in his 18 months of employment. The failure of the board to properly evaluate the superintendent's performance cannot be attributed to a lack of knowledge on the part of the board. The board held team building and goal setting sessions on August 7, 2002 and July 10, 2003, led by a TASB facilitator. The TASB facilitator also covered the

superintendent evaluation process as part of goal setting and the development of performance based goals during board training sessions in October 2002 and January 2003. Board minutes document a similar process for the evaluation of the previous superintendent in 2001–02. The review team has been unable to document any alternative process that the board may have followed instead of the recommended process set out in the Texas Administrative Code.

The board has not followed the recommended process for superintendent evaluations, which is a key process in holding the administration accountable to the board for performance. The board has also failed to set goals and then evaluate the district's progress toward achieving these goals—particularly in student performance improvement. The board's refusal to evaluate the superintendent in a fair and open manner may also breed a lack of trust, not only on the part of the superintendent, but also on the part of district administrators.

Effective school boards may use the superintendent evaluation process as part of a larger planning process. It is focused on the superintendent's progress in meeting previously established goals. An evaluation calendar is developed and agreed upon very early in the annual cycle, often in June or July before the beginning of the following school year. All board members and the superintendent collaboratively develop and agree upon final goals. The goals are based on district goals and priorities, initiatives related to major areas of district operation, and data related to student performance. After establishing goals at an interim meeting, the board often holds a formative conference to check on the superintendent's progress toward meeting the established district goals and to discuss any recent or pertinent developments.

An evaluation or summative conference is held usually at the end of the cycle to discuss the results of the year. The evaluation process often begins with a self–assessment by board members of their performance and that of the board as a whole. Recently, many boards have chosen to conduct the summative conference shortly after the district receives new student performance data. The superintendent's evaluation is not a summary of individual assessments; rather, it is the considered judgment of the board as a whole after thoughtful discussion.

The SSAISD board president and board members should take immediate steps to comply with the Texas Administrative Code by implementing the commissioner's recommended process for evaluating the superintendent. An important part of this

process is the agreement by the board and the superintendent on the goals and priorities for the upcoming year. The very process of goal setting and monitoring serves to improve district performance by focusing efforts on the district's major priorities.

At the beginning of the evaluation cycle, the board and the superintendent should meet together to set goals and develop a calendar to ensure that all needed steps take place. At a minimum, the calendar should include a meeting to discuss and agree on goals and priorities, an interim meeting or meetings to discuss progress toward meeting those goals and the developments and events that affect the goals, and an evaluation meeting at the end of the cycle to discuss the results of the year's work. These meetings are normally conducted as closed meetings unless the superintendent requests that they be open.

SSAISD should conduct a self–assessment of its own performance before beginning the superintendent's evaluation. Before meeting with the superintendent, board members should complete an individual evaluation using a copy of the evaluation instrument. The board should then meet without the superintendent to review individual responses, discuss differences, and try to reach agreement before holding the summative conference with the superintendent. If there are major performance issues with the superintendent, this meeting provides an opportunity for the board to consider its approach to addressing the issues. It also allows the board to address any factual or other misunderstandings or differences among its members. If it is impossible to reach consensus, the instrument should reflect the majority view, and the minority and majority views should be discussed with the superintendent.

BOARD TRAINING REQUIREMENTS (REC. 13)

SSAISD's board has not met individual and collective continuing education requirements set by the Texas State Board of Education (SBOE) regarding training, team building, and announcement of deficiencies and does not have a process to effectively collect and monitor associated documents. Individual board members have not met continuing education requirements for 2003–04. The board president has also failed to announce board member compliance with the SBOE requirements as required by state law and SSAISD policy. During interviews, several of the board members cited a lack of a process to consistently handle training reservations, reimbursements, and credit for completion or attendance at designated training as a reason for training discrepancies. Board members said they were told to contact TASB to verify personal

training, and one member said credit for legislative update was not recorded because a certificate of attendance was not issued for the training. Currently, the board's administrative secretary pre–registers board members for TASB training or training offered through Region 20. Board members are responsible for giving the original copies of any earned certificates or attendance sheets to the administrative secretary. One board member said no credits were recorded despite payments for training invoices having been passed through the board's administrative secretary. The board's administrative secretary said TASB had records of all training and the district did not maintain files containing completion certificates for all board members. Some board members said they were not informed of current hours or deficiencies in spring 2003 and 2004 and were told to maintain their own records when they made inquiries into their training hours.

The SBOE sets training requirements for new and existing board members in Texas Administrative Code (TAC) §61.1. The training requirements are 16 hours of annual training for new board members and eight hours for existing board members. Annual requirements are also based on the terms of office, usually lasting from May of one year to April of the following year. Board training requirements are also defined in SSAISD board policies, which are posted on the district website. This policy, BBD (LEGAL), requires board members to comply with any training required by the SBOE, including local district orientation for new members and an annual team–building session.

Exhibit 2–9 lists training hours for each SSAISD board member for May 2002 through April 2004 according to the board's administrative secretary. Three board members, David E. Carreon, Manuel R. Lopez, and Trinidad T. Mata, failed to meet their continuing education requirements for this period; however, Mr. Mata and Mr. Carreon stated that they did not receive credit for all attended training, whether offered through TASB or as legislative updates. Although reported, the board's

administrative secretary asked the board members to personally work with TASB to clarify any discrepancies.

The superintendent and all board members are required to participate annually in a three–hour team building session led by the Regional Education Service Center XX (Region 20) or other provider. Existing board members often fulfill three of the eight hours of required training by attending this session. The purpose of this session is to enhance the effectiveness of the board superintendent team and to assess the team's continuing education needs. All SSAISD board members participated in the required session in 2002–03. However, in 2003–04, all board members did not participate in the team building session. The district had scheduled the session for the June 11, 2003 specially called meeting that was later cancelled due to a lack of a quorum. As previously mentioned, a second scheduled session took place on July 10, 2003, but two members, Mr. Lopez and Mrs. Jimenez–Garza, were absent.

State law also requires that the board president announce the name of each board member who has completed the required continuing education, those who have exceeded the required hours of continuing education, and those who are deficient in the continuing education requirements. This information is to be reflected in the board minutes and made available to the media. The review team was unable to document this announcement in either 2003 or 2004.

Failure to participate in training reduces board members' effectiveness by limiting their understanding of the issues and concerns facing the district. It may also discourage cooperation among board members.

Effective school boards take advantage of board training opportunities offered at the annual TASB convention, local training offered in San Antonio through Region 20, and online training offered by TASB as well as other providers. Board training offered at local workshops provides a supportive

EXHIBIT 2–9
SSAISD BOARD MEMBER TRAINING
MAY 2002 – APRIL 2004

MEMBER	TRAINING HOURS MAY 2002–APRIL 2003	TRAINING HOURS MAY 2003–APRIL 2004
David E. Carreon	26.50	7.00
Jamie A. Gallegos*	No Requirement	14.50
Manuel R. Lopez	17.00	0.00
Connie Prado	9.50	12.00
Trinidad T. Mata	15.50	2.00
Cyndi A. Ramirez	25.75	9.75

SOURCE: SSAISD, Superintendent's Office, May 20, 2004.
*NOTE: In office less than a year during reporting period.

environment for learning and sharing viewpoints outside of the demands of regular board meetings. This local training also provides time for board members to understand one another and develop team relationships. Board training at outside events such as the TASB convention, provide opportunities to learn from experienced presenters and also learn how other districts have dealt with similar problems. The 2004 TASB convention provided 21 possible hours of professional development training for board members. SSAISD's board members attended some of the sessions and earned varying numbers of training hours at this annual convention.

The board president should ensure that all board members are aware of continuing education requirements and that members are offered multiple opportunities to meet these requirements. The board president and superintendent should develop a process to monitor both individual and collective board training that includes development and distribution of a calendar with multiple training opportunities from several sources and detailed steps outlining registration, attendance, reimbursement, and completion verification requirements. The developed calendar should also include a scheduled

time for the announcement of individual board member compliance with training requirements as outlined by law. This is required at the board meeting announcing the call for the next election of board members.

For background information on Board Governance, see page 162 in the General Information section of the Appendices.

FISCAL IMPACT

	RECOMMENDATION	2004–05	2005–06	2006–07	2007–08	2008–09	FIVE–YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
8.	Assign a Texas Education Agency (TEA) board governance conservator and strengthen the existing Code of Ethics policy to limit board involvement in daily operations.	($14,560)	($14,560)	$0	$0	$0	($29,120)	$0
9.	Reconstitute the board by creating two at–large positions and five single–member district positions.	$0	$0	$0	$0	$0	$0	($12,000)
10.	Develop board policies and procedures that clearly define the board's role in procurements.	$0	$0	$0	$0	$0	$0	$0
11.	Implement a formal selection process for attorneys and other professional service firms, including rankings by qualifications and mandate performance evaluations in subsequent formal agreements or contracts for services.	$0	$0	$0	$0	$0	$0	$0
12.	Develop a superintendent evaluation process that supports the accomplishment of district goals and meets the requirements of state law.	$0	$0	$0	$0	$0	$0	$0
13.	Develop and implement a tracking process to ensure that the board meets or exceeds individual member continuing education, team building, and announcement requirements.	$0	$0	$0	$0	$0	$0	$0
	Total	($14,560)	($14,560)	$0	$0	$0	($29,120)	($12,000)

SSAISD has a decentralized purchasing process managed by a small, centralized Purchasing Department consisting of a director and a secretary that report to the executive director for Business and Finance Services. The director's position has been vacant since early summer 2004 and, to date, the district has not hired a replacement. The Purchasing Department staff is responsible for developing bids and requests for proposals, receiving all bids, and approving all purchase orders. Districtwide users, however, initiate their own purchase orders. The Purchasing Department manages purchasing activities associated with competitively procured items but does not manage or supervise the procurement of many services, such as counseling services that are not competitively procured. User departments initiate and negotiate these services and submit the final contracts to the board for approval without Purchasing Department assistance or review. SSAISD maintains a central warehouse facility with more than 20,000 square feet of space that houses district records and both general and food service consumable items. The director of Special Projects/Transportation/ Bond Projects/Warehouse supervises the warehouse function and will be referred to as the director of Plant Operations for simplicity in the remainder of this chapter.

ACCOMPLISHMENTS
- SSAISD reduces advertisement costs by scheduling bids to allow consolidation of advertisements.

- SSAISD's participation in the Textbook Credit Pilot Project has allowed the district to obtain additional textbooks with existing book credits.

FINDINGS
- The district does not have a comprehensive contract list, centrally located contract files, or a consistent contract monitoring process with accountability methods to document performance problems or issues of contract noncompliance.

- The Purchasing Department does not directly participate in all aspects of the process to procure professional and/or legal services.

- SSAISD uses a manual requisition and purchase order approval process that is time consuming and labor intensive.

- SSAISD generates individual confirming, or non–routine, purchase orders for individual items needed for emergency repairs instead of using blanket purchase agreements that reduce administrative delays and costs.

- SSAISD does not extensively use available technology to efficiently notify and send vendors copies of bid documents and award information.

- SSAISD does not have a detailed purchasing procedures manual to assist district employees in complying with purchasing laws, addressing ethical issues, and detailing purchasing activities.

- The Purchasing Department does not have a completed internal department procedures manual to document its staff's daily duties and activities.

- The warehouse does not directly ship consumable supplies to users to minimize costs.

- The district does not use recycling or disposal contract terms and conditions to assist in appropriately disposing of computer equipment that contains hazardous materials.

- The district does not use available computer technology to efficiently manage its warehouse.

RECOMMENDATIONS
- **Recommendation 14: Implement a districtwide contract monitoring process managed by the Purchasing Department.** (**p. 47**) Implementing a consistent contract monitoring process managed by the Purchasing Department should allow the district to better define, monitor, and evaluate vendor and contractor performance, while reducing reliance upon fragmented departmental contract oversight. By immediately transferring all contract files to the Purchasing Department, developing a comprehensive list, and including performance measures in new and renegotiated contracts, the district should ensure districtwide contract compliance, maintain copies of all legal documents, and centralize responses to outside requests for contract information.

- **Recommendation 15: Develop and implement board policy to require Purchasing Department participation for all procured and contracted services and establish, document, and implement consistent procurement processes districtwide.** (**p. 48**) The district should include the director of Purchasing and the

purchasing staff in the evaluation, review, monitoring, and negotiation process to procure professional services. To promote consistency, the district should document any changes in current procurement practices, provide appropriate notification to all employees, and ensure districtwide implementation. By including the appropriate purchasing staff in all purchasing evaluations, as directed by board policy, the district mitigates the risk of perceived or real contracting irregularities and ensures that appropriate staff provides valuable technical assistance or input during evaluations and subsequent contract negotiations.

- **Recommendation 16: Implement an online requisition system to reduce purchase order processing time.** (**p. 49**) Although the district has an interim director of Purchasing and has begun discussions with Regional Education Service Center XX (Region 20) to activate an Internet–based system, Internet Texas Computer Cooperative Software (iTCCS), the district should prioritize immediate activation of this purchasing system. Purchasing Department staff should attend all associated training, which is currently covered under fees already paid to Region 20. Through implementation of an online system, the district should realize added efficiencies and annual savings, while providing associated staff with additional time to devote to departmental rather than clerical duties.

- **Recommendation 17: Implement blanket purchase agreements for emergency repair parts to minimize delays and reduce administrative costs.** (**p. 51**) The director of Purchasing should immediately work with the executive director for Business and Finance Services to obtain approval for blanket purchase agreements. The director of Purchasing should also work with the director of Plant Operations to analyze and identify the item categories most used for emergency repairs, appropriate monetary limitations for associated blanket agreements, and staff authorized to make related purchases. The district should also document any new procedures, ensure staff understand and comply with identified steps, and encumber necessary funds resulting in increased administrative efficiencies and minimized delays for emergency repairs.

- **Recommendation 18: Use available technology to reduce postage and mailing costs for bid and award notifications.** (**p. 52**) The Purchasing Department staff should expand use of the district's website, compile and use a

list of required vendor e–mail addresses, and enter into a free interlocal agreement with the Bexar County Purchasing Department to use the Texas Electronic Government (TEG) for electronic postings. The district should consequently reduce mailing costs and associated administrative time and delays.

- **Recommendation 19: Expand the purchasing procedures to include additional process and ethics information.** (**p. 53**) SSAISD should expand existing purchasing procedures to include details for competitive and non–competitive types of purchases, an ethics section outlining employee expectations regarding vendor interactions and all aspects of the purchasing process, and clearly defined employee roles and responsibilities. The director of Purchasing should conduct districtwide in–service training for all employees that purchase goods or services and place the expanded procedures on the district's website, ensuring availability to both staff and vendors. By increasing process–oriented details, including ethical expectations, and expanding training and documentation access to departmental procedures, the district should ensure districtwide standardization of purchases and enhance the community perception of enforced ethical behavior associated with procurements.

- **Recommendation 20: Develop an internal procedures manual for Purchasing Department staff.** (**p. 54**) By ensuring that the Purchasing Department has documented, detailed, and updated procedures, including relevant computer instructions and form samples, the district should have the information necessary to complete all functional duties in the event staff leaves or is absent, and new or temporary employees are responsible for day–to–day operations.

- **Recommendation 21: Implement direct vendor or just–in–time delivery of consumable supplies and store all surplus and salvage items inside the warehouse until disposal.** (**p. 54**) Although direct vendor delivery may have a higher unit cost for items directly shipped from vendors to campuses and departments, reductions in personnel and transportation costs associated with maintaining the district's warehouse should offset these costs. Implementation of a direct delivery program should also allow the district to dedicate warehouse space as a storage area for tracking and disposal of surplus and salvage items. Since the district will continue to use the

warehouse to manage fixed assets and maintain limited custodial supplies for emergencies, the remaining staff should include one warehouse employee and a secretary.

- **Recommendation 22: Incorporate recycling and disposal requirements into all contracts for computer purchases.** (**p. 55**) Incorporating recycling and disposal requirements into its computer purchases should ensure the district disposes of these items appropriately and complies with any hazardous waste regulations. The district should develop a clause for use in computer purchase contracts that includes recycling and disposal specifications and identification of any district responsibilities for maintaining and storing the equipment until transfer to the vendor for recycling. The clause should also include a formula for estimating any salvage value that will be paid to the district when the equipment is recycled.

- **Recommendation 23: Implement the Internet Texas Computer Cooperative Software (iTCCS) warehouse module and provide staff training.** (**p. 55**) The district's agreement with Region 20 includes access to the requisition/warehouse module at no additional cost. The district should implement this warehouse feature in conjunction with the implementation of the online requisition system, which is currently planned for 2004–05. The director of Plant Operations should work with the director of Purchasing and the executive director for Business and Finance Services to develop the security structure, designate three to four key users and their access to the system, and obtain "train the trainer" training from Region 20.

DETAILED ACCOMPLISHMENTS

ADVERTISING BID OPENINGS

The Purchasing Department schedules consolidated bid openings to reduce advertising costs. SSAISD is cost–effectively managing these bid openings to use a single, consolidated advertisement rather than multiple advertisements, while complying with all state regulations. The Texas Education Code (TEC) requires school districts to advertise bids worth more than $25,000 at least once a week for two weeks in any newspaper published in the county in which the district is located. Those between $10,000 and $25,000 must be advertised in two successive issues of any newspaper in the county.

The district, for example, consolidated 12 catalog bids into one advertisement that was published in the local newspaper on July 22 and July 29, 2003. The advertisement contained a banner identifying that SSAISD requested sealed bids for the 12 items, the individual bid numbers, the opening date and time for each of the 12 items, and a paragraph with the Purchasing Department's contact information.

The cost of the consolidated advertisement for both weeks was approximately $865, while the cost for a single advertisement containing the same basic information for two weeks is estimated to have cost the district $170 for each item for a total of $2,040. In this instance, the district saved more than $1,000 by consolidating multiple bids into a single advertisement. Staff continues to employ this practice to promote efficiency and save the district advertising costs.

TEXTBOOK CREDIT PROJECT

SSAISD applied and was accepted into a Pilot Textbook Credit Project that provides the district with flexibility and additional funding for textbooks in the form of textbook credits. House Bill 623 of the 77th Legislature required the TEA to study the use of credits for textbooks. SSAISD has been a test site for the pilot program since 2001–02 and currently has $1,500 in designated credits to use toward the purchase of classroom sets of texts for computer courses. According to the textbook coordinator, participation in the program and examination of books that provide the district with credits has enabled the district to plan for purchases otherwise unavailable to them.

The Textbook Credit Pilot Project allows participating school districts or open enrollment charter schools to receive credit for selecting textbooks that are priced lower than the state maximum cost. The district orders the textbook from the TEA online textbook ordering system, Educational Materials and Textbooks (EMAT). The EMAT software calculates the credit based on the individual district's selection(s).

DETAILED FINDINGS

INEFFECTIVE CONTRACT OVERSIGHT AND MAINTENANCE (REC. 14)

The district does not have a comprehensive contract list, centrally located contract files, or a consistent contract–monitoring process with accountability methods to document performance problems or issues of contract non–compliance. The director of Purchasing said that while the Purchasing Department monitors the performance of contracts processed through that department, it relies on the various user departments to provide first line vendor performance monitoring and resolve problems, with goods or services provided according to contracted

terms. The Purchasing Department also does not monitor the performance of any contracts processed directly to the board, such as those that may be extended for professional services provided by counselors, diagnosticians, attorneys, or architects. The lack of a central file location or a comprehensive contract list makes it difficult for Purchasing Department staff to determine which contracts are in effect, answer outside contract–related questions, review contract terms and conditions, and assess overall contractor performance.

In 2003–04, the Technology Department monitored information technology contracts; the Food Services Department monitored grease trap cleaning, food service equipment repair, and garbage equipment; and the Maintenance Department monitored maintenance–related contracts. Although infrequent, the director of Purchasing deletes a vendor from the district's vendor list if the Purchasing Department receives a lot of complaints about a vendor's performance.

Effective organizations maintain master contract lists and files in a central location, include accountability terms in executed contracts, and monitor contract terms and conditions to verify contractor performance and ensure receipt of quality goods and services as specified in individual contracts. Many organizations and districts rely on user departments as the initial point for monitoring and documenting contractor performance and compliance; however, their processes often include Purchasing Department support and oversight to address contractor performance problems and monitor renewals. The Purchasing Department assists the user department with assessing and documenting non–compliance and developing and initiating corrective actions with the contractor.

The district should immediately institute a process that establishes centralized contract files, a master contract list, accountability measures in all contracts, and consistent monitoring and notification procedures. Implementing a consistent contract monitoring process managed by the Purchasing Department should allow the district to better define, monitor, and evaluate vendor and contractor performance and renewals, while reducing reliance upon fragmented departmental contract oversight. The district should centralize all files and develop a comprehensive list of all contracts currently in effect, with the contractor's name, date of the contract, a brief description of the goods and/or services being provided, the amount and payment terms of the contract, the contract expiration date, and the name and title of the SSAISD employee in charge of administering and monitoring the contract.

Purchasing Department staff should then review and ensure that all contracts include performance and accountability measures and work with user departments to identify necessary accountability measures for inclusion in future. Purchasing Department staff should also provide training to user departments and assist in developing written steps to ensure proper monitoring and documentation of contractor performance, including the notification procedure and district requirements for instances of contract non–compliance.

EXCLUSION OF PURCHASING DEPARTMENT IN PROFESSIONAL SERVICE PROCUREMENT (REC. 15)

The Purchasing Department does not directly participate in all aspects of the process to procure professional services. The board delegates the authority to negotiate professional service contracts to the district's legal counsel and allows individual departments to bypass the Purchasing Department when procuring, negotiating, and submitting professional service requests. There are several different processes used to procure professional services, depending on the type of service required.

The Purchasing Department does not review or monitor the procurement of services related to programs such as diagnosticians, counselors, occupational therapists, and speech therapists. In 2003–04, for example, the board authorized more than $141,500 in payments for contracted services of more than $10,000 each to individuals for speech therapy services independent of the Purchasing Department. Purchasing is also not involved in procurement of outside legal counsel. For example, the board changed attorneys without the use of a Request For Proposal (RFP) or assistance from the Purchasing Department and directly approved contract payments of more than $49,000 to its legal counsel in 2003–04.

The Purchasing Department is involved in the preliminary coordination of the Request for Qualification (RFQ) process used to procure architect and engineering services. The Purchasing Department obtains and compiles specification information from requesting departments, advertises it in the form of an RFQ, and forwards received vendor responses back to user departments or committees. Although the Purchasing Department coordinates these RFQ steps, the director of Purchasing is not involved in the evaluation or negotiation process and does not generally participate in any subsequent negotiations currently handled by the district's legal counsel. In 2003–04, the district paid an architectural firm nearly $445,000 and another architectural firm nearly $308,000 for

services related to the 2002 bond on contracts that were awarded without input from or managerial oversight by the Purchasing Department

Oftentimes, Purchasing Department participation in the procurement of all professional services provides benefits and protection to both districts and their respective communities. Districts and businesses using this participation and input benefit from technical advice, previous experience, and market research conducted by Purchasing Department staff during the procurement process. These staff often have access to many procurement databases, experience in identifying competitive market prices for similar services, and can serve as an independent source and offer the user an unbiased perspective. The staff helps ensure a developed scope of work does not unfairly restrict competition and mitigate any tendency for users to simply obtain services from a previously–hired vendor without fully researching and negotiating the best value from available and comparable vendors.

Purchasing Department staff assists users in developing evaluation criteria that will meet identified needs, yet allow qualified vendors to be fairly and impartially evaluated. The Purchasing Department's supervision of the evaluation process assures vendors and the outside community that the evaluation is being performed fairly and that contact and communication between evaluators and vendors before, during, and after the evaluation process is consistent and appropriate. Because of its access to market research and knowledge of local vendors, these Purchasing Department participants also assist users in developing a negotiating strategy to obtain the best pricing. Another significant benefit for entities that include Purchasing Department staff in these processes is legal and financial protection in its contracts. Purchasing Departments often cooperatively work with legal counsel to develop contracts that are consistent, allow a district or business to monitor contract performance, and include legal and financial accountability for non–performance.

Although professional services involve a negotiated procurement and may not be bid in the same manner as commodities, the approach used to procure them should be no different than any other district purchase. Professional services are often more complex and the determination of the best value is more complicated than commodities; however, the goal is to obtain needed services at the best value for the district, while ensuring that all vendors have open access to the district to provide those services and are treated ethically and consistently throughout the procurement process. In establishing a consistent contract development process for professional

services, the district should define staff roles and responsibilities and identify the expected level of Purchasing Department participation in the process. This participation may vary by the type of service being purchased. For example, the Purchasing Department may help to pre–qualify providers of frequently used services such as diagnosticians or counselors. District schools and departments would then select a provider from the pre–qualified list without further assistance from the department. In other cases the Purchasing Department would perform a more active role.

The district should document all Purchasing Department roles and responsibilities in detailed administrative procedures that address technical assistance in the development of a detailed scope of work, use market research to identify potential vendors and pricing information, employ active vendor solicitation based on market research, supervise of the evaluation process to ensure that it is conducted fairly and that there is no improper communication between evaluators and potential vendors, and participate in the negotiation and contract development process. The director of Purchasing should establish a committee of key users consisting, at a minimum, of principals and administrators that most frequently procure professional services, to cooperatively help develop the purchasing processes and defined procedures. The committee should present a draft of the procedures to the executive director for Business and Finance Services and the superintendent for approval. Once approved, the director of Purchasing should conduct training for principals and department heads on the new procedures. The director of Purchasing should also work with the district Webmaster to put the new procedure on the district website for easy access.

MANUAL PURCHASING PROCESS (REC. 16)

SSAISD uses a manual requisition and purchase order approval process that is time consuming and labor intensive. This process includes use of a seven–part form to signify and track origination, review, or approval by a supervisor, the appropriate campus or department head, the Business and Finance Department, the general accountant, the director of Purchasing, and the Purchasing Department secretary (**Exhibit 3–1**). Both the general accountant and the secretary verify the availability of funds and obtain approval from the director of Purchasing prior to actual encumbrance of funds. The secretary uses a module of the Region 20 South Texas Multi Regional Processing Center (STMRPC) business software to encumber the purchase orders. Region

EXHIBIT 3-1
SSAISD REQUISITION AND PURCHASE ORDER PROCESS
2003–04


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┌─────────────────────────────────┐        ┌─────────────────────────────────┐
│ Multi-carbon purchase order form│        │ Blue: originator copy retained  │
│ typed by originator or          │────────│ and filed by reference number.  │
│ supervisor.                     │        │                                 │
└─────────────────────────────────┘        └─────────────────────────────────┘
                │
                ▼
┌─────────────────────────────────┐        ┌─────────────────────────────────┐
│ Purchase order form sent to     │───────▶│ Purchase order form sent to     │
│ appropriate school or           │        │ appropriate executive director  │
│ department head for approval.   │        │ for approval.                   │
└─────────────────────────────────┘        └─────────────────────────────────┘
┌─────────────────────────────────┐
│ Approved purchase order form    │◀──────────────┘
│ sent to Business and Finance    │
│ Services Office (General        │
│ Accountant) to verify funding   │
│ exists.                         │
└─────────────────────────────────┘
                │
                ▼
┌─────────────────────────────────┐
│ General Accountant reviews form │
│ to verify appropriate coding    │
│ and follows up existence of     │
│ funding.                        │
└─────────────────────────────────┘
                │
                ▼
        ◇ Correct code ◇          ┌─────────────────────────────────┐
        ◇ and/or funds  ◇ ──No──▶ │ General Accountant contacts     │
        ◇ exist?        ◇         │ originator for budget transfer  │
                │                 │ and holds form until transfer   │
               Yes                │ occurs.                         │
                ▼                 └─────────────────────────────────┘
┌─────────────────────────────────┐
│ General Accountant approves form│
│ and sends to director of        │
│ Purchasing.                     │
└─────────────────────────────────┘
                │
                ▼
┌─────────────────────────────────┐
│ Director of Purchasing approves │
│ form and sends to purchasing    │
│ secretary.                      │
└─────────────────────────────────┘
                │
                ▼
┌─────────────────────────────────┐
│ Purchasing secretary assigns    │
│ purchase order number and       │
│ encumbers purchase order in     │
│ financial system.               │
└─────────────────────────────────┘
                │
                ▼
┌─────────────────────────────────┐
│ Purchasing secretary distributes│
│ and files purchase order copies.│
└─────────────────────────────────┘
```

Orange: Business Department copy filed by reference number.
Green: Business Department copy filed by purchase order number.
White: Vendor copy mailed to vendor.
Gold: Vendor copy mailed to vendor.
Yellow: Director or supervisor copy returned to originator's supervisor and filed by purchase order number.
Pink: Receiving copy–retained by originator or warehouse and used upon receipt of merchandise or services.

SOURCE: SSAISD, Business and Finance Services Department Procedures, 2003–04.

20 is updating to an Internet–based system, the iTCCS. Since June 2004, the district has been working with Region 20 for planned implementation of this online requisition system in 2004–05 which will be covered under existing fees already paid to the region.

To generate a purchase order, the originator types a requisition using a seven–part multi–carbon purchase order form that is forwarded, approved, disseminated among various departments, and ultimately stored as shown in **Exhibit 3–1**.

Survey responses from teachers, principals, and staff varied regarding the purchasing process (**Exhibit 3–2**). Teachers, administrators, and staff were almost equally split on whether they agreed or disagreed that the process was cumbersome. Approximately 31 percent of teachers and 28 percent of administrators and staff strongly agreed or agreed with the statement that the purchasing process is not cumbersome. In contrast, 33.8 percent of teachers and 24.5 percent of administrators and staff disagreed or strongly disagreed. Approximately 31 percent of teachers and 46 percent of

EXHIBIT 3–2
PURCHASING SURVEY RESULTS
MAY 2004

SURVEY QUESTION	STRONGLY AGREE	AGREE	NO OPINION/ NO RESPONSE	DISAGREE	STRONGLY DISAGREE
Purchasing processes are not cumbersome for the requestor.					
Teachers	3.2%	27.9%	31.2%	25.3%	8.5%
Administrators / Staff	5.3%	22.3%	45.7%	14.9%	9.6%
Principals	11.5%	42.3%	15.4%	23.1%	7.7%

SOURCE: SSAISD, School Review Surveys, May 2004.
NOTE: Percentages may not add to 100 percent due to, "no responses."

administrators/staff had no opinion or did not respond.

According to this process, the district cannot pre–encumber, or set–aside, funds during the approval process. Changes in balances or a lack of available funds cause purchase order delays until a budget transfer occurs. Sometimes purchasing delays also occur as the form is routed through inter–office mail for approval. The district also has an increased amount of filing and storage due to the seven paper copies generated from each of the forms. Staff commented that single item or emergency part purchases are time consuming using this process.

Many districts use online requisition software that integrates with financial management software to streamline the purchase order process, immediately encumber funds, and reduce administrative tasks and storage costs. These systems have electronic routing and approvals for budgetary and purchasing control. They have appropriation control features that ensure account codes are appropriate and that sufficient funds exist before initially issuing a requisition. Pre–encumbrance also ensures account balances remain the same from the time a purchase order is initiated until its final approval.

The Region 20 Internet system has all of these features. Harlandale ISD, a peer district selected for this review, implemented this online system in March 2004. According to district officials, implementation of the system has reduced processing time from two weeks to two days. Some districts also include features to address single–item purchases, such as pre–approved electronic blanket purchase agreements.

The district should implement the online purchasing system that should reduce administrative time for processing purchase orders and allow the Purchasing secretary time to perform other duties. The district should also realize $1,628 in savings by implementing this recommendation. The fiscal impact is based on the bid received in January 2004 for the multi–carbon purchase order forms. With an online requisition system, the cost of these forms will be eliminated. There is no additional software or training fees for use of the system since SSAISD's fee amount is based on its student enrollment.

The director of Purchasing and the executive director for Business and Finance Services should set up a user committee to identify the types of features desired. The committee should consist of department and campus staff that requisition purchases, representatives from the Purchasing Department, the executive director for Business and Finance Services, and the director of Technology. The committee should identify roles and responsibilities and assign tasks and completion dates to ensure the system is implemented in 2004–05. It should also define and recommend the desired approval and security levels. The director of Purchasing and the executive director for Business and Finance Services should review and approve the recommended security levels and options to ensure that appropriate budgetary and purchasing controls exist, while also providing maximum user flexibility. The implementation should also include user training. Region 20 provides training assistance at no additional cost under its software fee structure. The district should obtain two types of training: an initial training for new users and a "train the trainer" session. Three to four key district users should be designated as the key users who receive the "train the trainer" assistance. These key users can then train new district staff.

BLANKET PURCHASE AGREEMENTS (REC. 17)
SSAISD generates individual confirming, or non–routine, purchase orders for individual items needed for emergency repairs, resulting in increased administrative costs and delays. In 2002–03, 33 percent of all purchase orders processed were confirming. As of March 31, 2004, the district had already issued 1,903 confirming purchase orders. To process each of these orders, the user department must obtain a quote for a part, write a requisition, call SSAISD's Purchasing secretary with the estimated cost, vendor name, vendor purchasing number, and assigned requisition number (**Exhibit 3–1**). Upon receipt of the approved purchase order form, the purchasing secretary reviews it against a log book kept with initial

purchase order numbers and departmental quote information, notes any changes, and revises the log book accordingly. Since an invoice is generally attached, the purchasing secretary does not encumber funds but forwards the invoice and shipping copies of the purchase order form to the Accounts Payable Department for payment.

Since SSAISD does not use blanket agreements, administrative costs are increased because an individual purchase order form is processed for each emergency part or repair. Appropriation control is insufficient because funds are not encumbered until after a purchase has been made and an invoice received.

Blanket purchase agreements (BPA) with established dollar limits are a standard tool used by government purchasing departments to maintain appropriate controls yet minimize administrative costs and delays associated with small purchases. BPAs are pre–established orders with a specified ceiling limit that define a generic category of items, such as electrical supplies, instead of specific, individual parts. A BPA is similar to a charge account with established controls and limits to prevent misuse. User departments can immediately obtain parts without having to process requisitions for each single–item or small order necessary for many emergency repairs. Payment requisitions and associated administrative duties are also reduced since invoices are processed against an established blanket purchase agreement. Purchasing departments encumber funds prior to any purchases, thereby enhancing appropriation control.

The director of Purchasing should work with the director of Plant Operations, who oversees the maintenance area, to analyze and identify the categories of maintenance items that would benefit from the use of a blanket purchase agreement. Examples of some of these categories are heating and air conditioning supplies, electrical supplies, and plumbing supplies. The Purchasing and Plant Operations directors should establish a limit for each category based on an analysis of annual use and then jointly develop internal procedures for use of the agreements. The procedures should include a list of individuals authorized to make orders under the agreement and a list of required documentation for order verification and pick–up. Procedural steps should include details regarding ordering, pick–up, documentation maintenance, and payment submissions.

The executive director for Business and Finance Services should also review and approve all developed procedures to ensure maintenance of appropriate internal controls. After establishing funding limits for identified categories, the director

of Purchasing should contact several vendors for each category and negotiate a blanket purchase agreement for the fiscal year with the vendor(s) that provide the best discounts and most convenient locations to the district. The agreement should identify purchase limits, the district personnel authorized to order, a category of items, terms of sale, and requirements for supporting documentation on the sales ticket. The district should renegotiate and re–approve the agreements annually, and the director of Plant Operations should submit a blanket purchase order requisition at the beginning of each fiscal year for each of the selected vendors by category. The requisition amount should be for the authorized dollar limits established by the annual analysis. As parts are needed, authorized individuals should follow all procedures for order, pick–up, and required payment documentation. The director of Purchasing and the executive director for Business and Finance Services should liquidate any unused funds at the end of the fiscal year.

VENDOR BID NOTIFICATION (REC. 18)

SSAISD does not extensively use available technology to efficiently notify and send vendors copies of bid documents and award information. The purchasing secretary maintains a list of vendors in 16 areas for items that the district annually bids. After developing and advertising a bid, the purchasing secretary usually mails a bid packet to vendors on this list. Infrequently, the purchasing secretary also faxes or e–mails the bid packet, either upon request or because a vendor has provided an e–mail address on their initial vendor application. The district has also listed some bids in 2003–04 on the district website.

Besides mailing bid documents, the district also mails copies of award notifications to successful vendors and copies of the bid tabulations to all vendors that submitted a bid. Because the district relies on standard mail instead of technology to disseminate bid and award information, it incurs postage and supply costs. It also may not be reaching the largest number of potential vendors possible since many vendors use Internet–based notification systems to identify bid opportunities.

Many recognized purchasing organizations use e–mail and other Internet–based notification services to distribute bid documents and associated award notifications. For example, the Bexar County Purchasing Department uses Texas E–Purchasing Group (TEG) notification services. With TEG, vendors have the option to register for automatic e–mail or fax bid and award notification for a small annual fee or can individually retrieve information at

no cost. Bexar County extended the use of TEG at no cost to other public entities. San Antonio ISD and San Marcos Consolidated ISD both participate in TEG. Many districts, such as Harlandale ISD, routinely publish bid information on their district websites. The district should use available technology to reduce postage and mailing Savings are based upon costs associated with bid notifications and those associated with award notifications. The bid notification savings are based upon the number of bid packets—88 as of May 31, 2004—and the average number of vendors per bid—15 in 2003–04—for a total of 1,320 packets (88 bids x 15 packets sent per bid). The weighted average cost of sending a bid was calculated as $0.44, assuming that 80 percent of the bids cost $0.37 to mail and 20 percent cost $0.74 to mail [(.8 x $0.37 = .296) + (.2 x $0.74 = .148) = $0.44]. Total savings for eliminating bid mailings are $594 (1,320 mailings x $0.44 average cost of mailing = $586).

The award notification savings are based upon the number of bids—88 as of May 31, 2004—and the average number of bids received—eight in 2003–04—for a total of 704 bids (8 vendors/bid x 88 bids = 704). The review team estimated that 80 percent of the notifications—563—were courtesy notices to unsuccessful bidders (.8 x 704 = 563). The award notifications cost $208 (563 notifications x $0.37 per notification = $208). Total savings for bid and award notifications is $794 ($586 bid notification savings + $208 award notification savings = $794).

PURCHASING PROCEDURES MANUAL (REC. 19)

SSAISD does not have a detailed purchasing procedures manual to assist district employees in complying with purchasing laws, addressing ethical issues, and detailing purchasing activities. SSAISD's purchasing procedures are global rather than detailed and are contained in a chapter of the district's *Business Office Procedures* manual. The purchasing procedures contained in the *Business Office Procedures* manual are updated annually. The purchasing procedures section contains:

- A memorandum stating the district thresholds for purchasing contracts and obtaining quotes;

- A quote request form;

- A memorandum identifying that sole source items require a notarized statement from the vendor and a memorandum from the user stating it is a sole source item;

- Instructions for completing a purchase order form;

- General information for checking out Best Buy, HEB, and SAM's cards that are kept in the Purchasing Department; and

- General reminders for completing forms for the annual order from the Region 20 cooperative.

The procedures section also includes a list of service repair vendors approved for 2003–04 and a bid listing for school–related items. The procedures section does not, however, clearly define the competitive requirements or process to be followed for each type of competitive and non–competitive purchase made, and does not clearly identify the roles and responsibilities of district employees for these purchases. It also does not also include a purchasing section outlining purchasing ethics and general standards to use when interacting with vendors and throughout the purchasing process. There is also no information related to approved cooperatives and other available contracts available through the state of Texas.

A purchasing manual with detailed procedures is an essential training and reference tool to ensure that all district employees who perform purchasing activities are aware of and understand the district's purchasing policies and follow the same procedures in a standardized manner. Detailed procedures often improve compliance with procurement laws and regulations by reducing errors and misunderstandings about the process and explain established policies and procedures to vendors.

Section 3.2.1 of the Texas Education Agency's *Financial Accountability System Resource Guide* (FASRG) recommends that every school district have a written manual describing its purchasing policies and procedures. According to the FASRG, a purchasing manual assists campus and department personnel and can be used both internally and externally to promote consistency in purchasing applications. It contains rules and guidelines for purchases consistent with relevant statutes, regulations, and existing board policies. Section 3.1.3 of the FASRG states that ethics related to conflicts of interest, financial interests in firms conducting business with a school district, kickbacks and gratuities, and improper use of position or confidential information should be clearly communicated throughout a district. It also states that school district personnel should be made aware of the penalties for violations of purchasing laws and ethics.

Smithville ISD's purchasing manual describes the district's purchasing organization, roles and responsibilities of the procurement officer and district employees, board purchasing policies and statutory purchasing requirements, and explanations of the competitive procurement options used.

The district should develop a purchasing manual that includes these elements and also includes an outline of the procedures and forms used for competitive bidding, requests for proposals, competitive sealed proposals, purchase orders, and central supply requisitions. Additional details should include ethical purchasing expectations for district employees.

DAILY DEPARTMENTAL PROCEDURES (REC. 20)

The Purchasing Department does not have a completed internal department procedures manual to document staff's daily duties and activities. Since the department is small and staff is experienced, they did not prioritize documentation of internal procedures. The director of Purchasing and the Purchasing secretary have both been in the Purchasing Department for more than 15 years. However, the director of Purchasing retired in June 2004, and he singly performed many of the procurement activities. The district currently has an interim director and has not hired a replacement, and the department still does not have documentation of all daily operations and required performances.

Effective organizations document internal procedures to ensure continuity in operations and institutionalize knowledge. The procedures ensure that the organization can continue operating when key staff members leave or retire. The procedures are also a tool to quickly train new staff in department operations and processes and help ensure that knowledge regarding specific types of purchasing, such as cooperative or catalog purchases, are not limited to certain employees. Use of standardized and properly documented procedures mitigates the risk of only one employee having a vast amount of a department's information on purchasing processes and any inherent systems of obtaining information and instituting performed checks and balances. The interim director of Purchasing and the Purchasing secretary should immediately document key daily functions and step–by–step instructions to complete the process including any relevant computer references and sample forms. Purchasing Department staff should then expand that documentation to include all operational duties and internal processes to facilitate a smooth transition for a new director of Purchasing and for any future departmental staff changes ensuring vital Purchasing Department functions continue with ease. The director of Purchasing should update the manual on an annual basis.

WAREHOUSE SHIPPING (REC. 21)

The warehouse does not directly ship consumable supplies to users to minimize costs. While items such as computers and furniture are generally shipped directly to a campus or department, consumable items are not. Instead, items such as janitorial supplies, school supplies, and paper products are shipped to the warehouse. The district orders these supplies in bulk, stores them in the warehouse, and distributes them to campuses upon request.

Since most of the warehouse space is dedicated to consumable supplies, there is little available space to use as a staging area to store surplus and salvage items for auction. These items are stored on shrink–wrapped pallets behind the warehouse building and are subject to poor environmental conditions. During the site visit in May 2004, the review team saw more than 10 pallets of shrink wrapped surplus computer equipment and furniture that was exposed to sunlight and rain. The shrink–wrapping on several of the pallets was ripped and the materials were wet.

Although the district receives bulk purchase prices for items shipped to its central location, there are increased personnel and transportation costs associated with maintaining a central warehouse to receive, store, and distribute bulk orders of consumable supplies. With large bulk orders, warehouse staff spends significant time receiving, storing, and distributing these supplies and is not available to perform other tasks such as timely pickup of surplus and salvage items transferred from campuses and departments to the warehouse for subsequent auction or disposal. In addition, the bulk storage of consumable supplies in the warehouse results in the storage of surplus and salvage items outside the warehouse and reduces the potential auction value of these items.

Many districts reduce their warehouse costs through direct vendor or just–in–time delivery of supplies and materials. These districts also reduce or eliminate the need and associated costs of storing supplies and materials in a central warehouse facility.

The director of Plant Operations should work with the director of Purchasing and the executive directors for Business and Finance Services and Human Resources and Student Services to phase in direct vendor delivery or just–in–time delivery and eliminate warehouse staff. In addition, the director of Plant Operations and director of Purchasing should identify and analyze existing cooperative contracts, such as Buyboard, or existing interlocal agreements with San Antonio governments, such as Bexar County or the City of San Antonio, that provide direct vendor delivery services and determine the best pricing for paper, school items, and custodial supplies. The district should develop agreements to access these contracts according to a phase–in schedule.

Although there are no cost savings anticipated for the initial transition year for this recommendation, it is estimated that additional costs for supplies should be offset by a phased–in reduction of staff throughout the year. Annual savings are estimated to reach $55,436 beginning in the second year of implementation based upon the elimination of the warehouse supervisor and two warehouse employees. The average salaries of the two warehouse employees are $18,720, and the actual salary of the warehouse supervisor is $29,792, for a total of $67,232 [($18,720 average salaries x 2 warehouse employees = $37,440) + $29,792 supervisor salary]. Total fringe benefits' savings equal $13,562 based upon two rates: 27.95 percent applied to the warehouse employee salaries, and 10.4 percent applied to the supervisor salary [(27.95 percent x $37,440 warehouse employee salaries = $10,464) + (10.4 percent x $29,792 supervisor salary = $3,098) = $13,562]. Total savings from salaries and fringe benefits is $80,794 ($67,232 salary savings + $13,562 fringe benefit savings = $80,794).

The salary savings are offset by increased costs for direct delivery of supplies. The review team estimates that the district will spend 20 percent more in supplies based on estimates received for key paper and office supplies. The estimates received ranged from 15 to 25 percent more than current pricing from the Region 20 cooperative. In 2003–04, the district budgeted expenditures of $126,789 for paper, office, and custodial supplies. Applying a 20 percent factor, the district should spend an estimated additional $25,358 for direct delivery. Annual savings are again estimated at $55,436 ($80,794 salary savings - $25,358 additional supply costs = $55,436), or $221,744 for four of the five years of implementation.

RECYCLING AND DISPOSABLE REQUIREMENTS (REC. 22)

The district does not use recycling or disposal contract terms and conditions to assist in appropriately disposing of computer equipment that contains hazardous materials. When a campus or department no longer uses computer equipment, it is transferred to the warehouse for disposal. With limited storage space, district staff routinely stores the transferred computer equipment on shrink–wrapped pallets behind the warehouse building. During the site visit in May 2004, the review team saw several shrink–wrapped pallets with surplus computer equipment stored outside. The computer assets remain on the pallets until they can be auctioned or disposed of by other means.

Computer equipment contains hazardous materials that must be managed appropriately when it is

disposed. Monitors contain metal lead. Circuit boards contain lead, cadmium, mercury, and other hazardous materials. Without contract clauses that contain recycling or disposition requirements for hazardous materials, the district is responsible for appropriately handling and disposing of these items in accordance with federal, state, and local regulations. This can be expensive since landfills no longer accept these items.

To assist with appropriate disposal, many public sector organizations include equipment–recycling requirements in their purchase and bid documents. The New Mexico State Purchasing Agency (NMSPA) required vendors to offer an equipment take–back or recycling service for computer equipment as part of its request for proposals in October 2003. Bexar County included equipment removal and disposition in its bid for an x–ray processor/clinical image management system.

The director of Plant Operations should work with the director of Purchasing and the director of Technology to identify and incorporate disposal and recycling requirements into all contracts for computer purchases. The director of Purchasing should contact other state and local purchasing organizations to research and obtain example clauses.

LACK OF WAREHOUSE TECHNOLOGY (REC. 23)

The district does not use available computer technology to efficiently manage its warehouse. SSAISD uses four of 21 available menu options in the Region 20 iTCCS, which includes a warehouse application. The district uses the inventory and item maintenance options and two printing options, yet the inventory requisitioning and tracking process is manual and paper–based. To requisition an item from the warehouse, a campus or department must type the request on a three–part inventory requisition form prior to warehouse submission. Necessary request information includes the date of the request, the school or department making the request, the fund account code to be charged, the inventory item number, quantity, item description, and item cost.

The director of Plant Operations manually reviews and approves all requests before the warehouse supervisor and foreman, and employees prepare the order and check for accuracy and any damage in preparation for shipping. Upon shipping, the warehouse secretary manually calculates the departmental or campus charge using an inventory status report to locate the unit cost of the ordered items, enters that amount on the initial requisition form, and updates the computer inventory list to reflect any changes. Warehouse staff reviews the

inventory list weekly and completes a visual check to ensure minimum stocking levels exist. If levels are below the minimum, the staff completes a central warehouse re–order request form and sends it to the Purchasing Department.

The iTCCS warehouse module allows a user department to input a requisition online to obtain items from the warehouse. The software checks for sufficient funding before a requisition is routed to the warehouse. The software checks the requested items against available stock and generates a shipping ticket. When the shipping ticket is generated, the available inventory in the warehouse is reduced. As new items are received in inventory, the system will re–value the price of existing and new inventory to calculate the inventory value.

Many districts with access to iTCCS capabilities fully implement associated applications, increasing efficiency and eliminating any costs and

administrative time associated with a manual system. Personnel in these districts are also able to pre–encumber funds while processing an order. This technology allows a district to track use of items for future planning and needs forecasts, further improving warehouse efficiency and effectiveness related to inventory and budgetary operations. It also reduces the processing time between order and delivery.

The director of Purchasing and director of Plant Operations should immediately contact Region 20 representatives to identify necessary training and establish appropriate timelines to implement these available iTCCS modules, which are already covered under existing fees paid to the region.

For background information on Purchasing and Acquisition Management, see page 162 in the General Information section of the Appendices.

FISCAL IMPACT

	RECOMMENDATION	2004–05	2005–06	2006–07	2007–08	2008–09	FIVE–YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
14.	Implement a districtwide contract monitoring process managed by the Purchasing Department.	$0	$0	$0	$0	$0	$0	$0
15.	Require Purchasing Department participation for all procured and contracted services and establish, document, and implement consistent procurement processes districtwide.	$0	$0	$0	$0	$0	$0	$0
16.	Implement an online requisition system to reduce purchase order processing time.	$1,628	$1,628	$1,628	$1,628	$1,628	$8,140	$0
17.	Implement blanket purchase agreements for emergency repair parts to minimize delays and reduce administrative costs.	$0	$0	$0	$0	$0	$0	$0
18.	Use available technology to reduce postage and mailing costs for bid and award notifications.	$794	$794	$794	$794	$794	$3,970	$0
19.	Expand the purchasing procedures to include additional process and ethics information.	$0	$0	$0	$0	$0	$0	$0
20.	Develop an internal procedures manual for Purchasing Department staff.	$0	$0	$0	$0	$0	$0	$0
21.	Implement direct vendor or just–in–time delivery of consumable supplies and store all surplus and salvage items inside the warehouse until disposal.	$0	$55,436	$55,436	$55,436	$55,436	$221,744	$0
22.	Incorporate recycling and disposal requirements into all contracts for computer purchases.	$0	$0	$0	$0	$0	$0	$0
23.	Implement the Internet Texas Computer Cooperative Software (iTCCS) warehouse module and provide staff training.	$0	$0	$0	$0	$0	$0	$0
Total		$2,422	$57,858	$57,858	$57,858	$57,858	$233,854	$0

CHAPTER 4

DISTRICT MANAGEMENT AND COMMUNITY RELATIONS

The South San Antonio Independent School District (SSAISD) superintendent serves as the chief executive officer of the district providing leadership internally for operations and programs and externally as a representative to the business and local community. The superintendent makes policy, budget, and procedural recommendations to the board, implements board-adopted policies, evaluates district operations and programs, and ensures that operational and programmatic goals match district plans. There are also five senior administrators who report to the superintendent and are directly responsible for the instructional, operational, support, administrative, and financial functions of the district.

ACCOMPLISHMENTS

- The district uses a Parent Development Center to disseminate a variety of information, coordinate some health programs, increase parent involvement and fulfill community education needs.

- SSAISD uses advisory committees and coordinates media releases by the Communications and Community Relations Office to solicit community input and involve the community in district decision–making processes.

- SSAISD uses a unique program, South Sansational Awards, to promote and celebrate elementary and middle school student success and support smooth student transition from elementary to middle school.

FINDINGS

- The current central organization is inadequately staffed and does not address all of the instructional, management, operational, and evaluative needs of the district.

- SSAISD is not consistently using and implementing industry staffing standards for clerks.

- The district does not have a coordinated approach to address business and community partner recruitment.

- The district's external newsletter, *Today's South San,* lacks basic publishing elements.

- The district has not approved creation of an education foundation.

- SSAISD does not consistently track volunteer activities or report volunteer results.

- The Title I and Migrant Parent Advisory Councils (PAC) are not routinely used to involve parents in the decision–making process.

RECOMMENDATIONS

- **Recommendation 24 (p. 60): Modify the organization to group like functions, reduce the span of control for the superintendent, and provide coverage of needed central functions.** The superintendent has 18 direct reports, including all principals and directors, and the instructional delivery reporting structure is fragmented. Through an organizational restructuring that includes a logical grouping of similar functions under a single administrator and reducing the number of direct reports to the superintendent, the district should improve both districtwide and departmental direction and accountability and maintain a balance of responsibilities among senior.

- **Recommendation 25 (p. 64): Implement enrollment–based staffing formulas for clerical staff at all schools.** SSAISD should implement staffing formulas based upon industry standards for school clerical staff at all levels, particularly at the secondary level. Implementation of industry standards should allow the district to eliminate nine clerical positions resulting in significant cost savings.

- **Recommendation 26 (p. 65): Expand the Communications and Community Relations Department's responsibilities to include actively recruiting business and community partners.** The district should expand the responsibilities of the Communications and Community Relations Department to include developing and identifying goals and objectives in the annual District Improvement Plan. By assigning coordination and including tangible annual goals to improving business and community partner relationships, the district is prioritizing recruiting efforts and should subsequently increase these partnerships to support students and staff districtwide.

- **Recommendation 27 (p. 67): Redesign the district publication *Today's South San* and publish in both English and Spanish.** By obtaining appropriate software and training, and researching other district publications, the

Communications and Community Relations Department should be able to improve the quality of the newsletter and overall efforts to communicate with the SSAISD community. The district should use district and/or community translators to provide translation services for the newsletter on a regular basis.

- **Recommendation 28 (p. 68): Establish an education foundation.** SSAISD The SSAISD board should authorize creation of an independent education foundation to should create an education foundation committee initially composed of key staff members, to visit, learn, and gather information about neighboring foundations

- **Recommendation 29 (p. 68): Assign coordination of districtwide parent and volunteer background information and activities to the Parent Development Center and maintain centralized records.** By assigning central coordination of volunteer and parent background information and activities and collecting related data from all campuses, the district should be able to identify effective programs for replication and redistribute and match volunteer skills with campus needs as necessary. In addition, the district should publish volunteer efforts as a strategy to promote community pride and increase parent and volunteer participation districtwide.

- **Recommendation 30 (p. 70): Include parental input in the decision-making process for the Title I/Migrant Parent Advisory Council by designating and publicizing specific meetings at the beginning and ending of each school year for this purpose.** While the information provided at each Title I/Migrant Parent Advisory Council is informative, the district should ensure that at least one session at the beginning and the end of each school year focus on direct parental involvement and obtaining parental ideas and suggestions for Title I and Migrant program activities and related decisions.

DETAILED ACCOMPLISHMENTS

PARENT DEVELOPMENT CENTER (PDC)

The district dedicates a separate facility, designates staff, partners with additional agencies, and disseminates a variety of information to increase parent involvement and fulfill community education needs. The Parent Development Center (PDC) is a district–level resource available to all SSAISD parents and community members. The goal of the PDC is to "…bring parents and schools into a closer partnership in the educational success of students by making educational materials available…"

The PDC has a lending library of books, videos, and tapes on parenting skills and other educational topics and provides a meeting place for a variety of parental and adult education classes. For example, in 2003–04 the PDC sponsored meetings for the Title I/Migrant Parent Advisory Councils to provide information on a range of topics to parents of migrant students. Presented topics included the following:

- Implementation of Title I Program;

- Safety;

- Fire Prevention;

- Secondary Education;

- Salsa: Health, and Nutrition;

- Adult Education;

- Public Safety Awareness;

- The Four Dimensions of Parent Participation; and

- Evaluation of Previous Year and Planning for Application of New Federal Program.

SSAISD's PDC also provides adult/community education opportunities including the following classes offered in spring 2004: General Educational Development (GED) courses, English as a Second Language, keyboarding, data entry, introduction to computers, Microsoft Word, Microsoft Excel, cake decorating, jewelry making, and mariachi classes.

In addition to meetings and classes, the PDC publishes a variety of booklets, newsletters, and brochures in both English and Spanish with current information about educational, social, nutritional, and emotional issues related to families. **Exhibit 4–1** lists a sample of these documents.

The Parent Corner/Queridos Padres, for example, is a parent newsletter that includes a variety of parenting tips addressed in some of the following articles:

- How Do You Rate…In Helping Your Child With Reading? / ¿Cómo Califica Usted En La Lectura Con Su Niño/Niña En La Lectura?;

- Motivating Your Child to Read/Motivando a Su Niño/Niña A Leer;

- Love…The Greatest Gift/El Amor…El Regalo Más Grande;

- Mom? Dad? Are You Listening?/¿Mamá? ¿Papá? ¿Estás Oyendo?;

EXHIBIT 4–1
PARENT DEVELOPMENT CENTER PUBLICATIONS
MAY 2004

TOPICS/PUBLICATIONS	TOPICS/PUBLICATIONS
Parent Education: Title I Programs	Vacaciones de Verano
Title I Reference Guide	The Parent Corner/Queridos Padres Newsletter
Why Parents Make the Difference	Child Development Stages
Tips for Reading and Writing to Your Child	Title I Parent Advisory Council Handbook
Usando Matemáticas en la Cocina	Providing Encouragement
Winter Vacation Activities	Writing at Home
Comprensión en la Lectura	

SOURCE: SSAISD, Parent Development Center, May 2004.

- Educational Jargon Parents Need to Know/Palabras Educacionales Que Los Padres Necesitan Saber; and

- Walls or Bridges?/¿Paredes O Puentes?

The PDC also partners with the Bienestar Health Program. Bienestar is "committed to the social and health well-being of populations at-risk." Bienestar's objectives are to decrease dietary fat intake, increase fruit and vegetable intake, increase physical activity, and prevent obesity. The Program offers a health curriculum for use at home and in the schools matching these objectives and sponsors exercise clubs such as the weekly Health Club started in 2003–04 for fourth graders at three schools and a partnership with Zumba Fitness providing high-energy Latin music workouts for students in all grade levels. In 2004–05, the Health Club expanded to include more elementary schools. The school cafeteria portion of the Bienestar Health Program consists of nutrition and health-related training for cafeteria staff. In May 2004, Bienestar sponsored the South San ISD Health Fair for parents, staff, and community members.

For 12 years, the PDC has also offered a summer migrant program, the Summer Migrants Access Resources through Technology (SMART) Program for migrant students from preschool—age three—through grade 12. SMART is a national distance learning instructional program that is broadcast via satellite from the Regional Education Service Center XX (Region 20) in San Antonio, for eight weeks during the summer. The SSAISD SMART Program, which includes books, snacks, and transportation, is free and provides instructional assistance as well as fun activities and field trips for enrolled students. The PDC also offers a home-based SMART Program available to students that do not wish to attend the site-based program. Five teachers, two instructional aides, and two clerical migrant assistants deliver instruction to students at their homes through this portion of the SMART Program.

The district already has begun construction on a second Community Learning Center, scheduled to open in 2006, to increase districtwide parent, family, and community services.

COMMUNITY INVOLVEMENT IN DISTRICT DECISION-MAKING

SSAISD uses advisory committees and coordinates media releases by the Communications and Community Relations Office to solicit community input and involve the community in district decision-making processes. The district uses the Communications and Community Relations Office to disseminate information about facilities plans and to promote parental, staff, business, and neighborhood involvement in permanent projects affecting the entire community. In 2003–04, SSAISD used advisory committees to provide input to district administrators, including the 2004 Bond Parent Advisory Committee, the School Health Advisory Committee, the Safe and Drug Free Schools and Communities Advisory Committee, the Parent Advisory Committee, and the School Naming Committee.

The district created the 2004 Bond Parent Advisory Committee from the Parent Advisory Committee and included parents from all schools in addition to community members to serve on the committee. Committee members said that this committee allowed parents to get directly involved and remain involved in the 2004 bond issue. For example, the district encouraged parents to work directly with school principals and the committee presented the bond proposal to board members. Members said that this committee is an improvement over the committee formed for the 2002 bond issue, in which parents were used in the process to select contractors, but not to discuss specific bond issues. One member said, "They let us carry the ball. We helped balance the budget regarding the bond." Committee members met collectively from March through May 2004 and decided which items to include and which items to delete in the final bond

proposal. The committee presented the proposal at a meeting with the community at large in late May, 2004 and in collaboration with a scheduled PTA meeting. Though members recognized that not all committee members regularly attended meetings, they felt that the district made a sincere effort to request citizen input.

The School Health Advisory Committee is also an active committee with a history of responsibilities including review of curriculum and programs related to health and human reproduction. New responsibilities focus on representing the eight components of a coordinated school health program—health education, physical education, health services, nutrition services, counseling, psychological and social services, healthy school environment, health promotion for staff, and family/community involvement. Members include parents, students, clergy, health care providers, businesses, law enforcement representatives, senior citizens, school representatives, and nonprofit health care professionals. In 2004, the committee met in March and May.

In spring 2004, the district formed a School Naming Committee to solicit suggestions for names of future facilities. The district published articles in the local media, invited community members to submit names for both of the planned facilities, and sent a letter in English and Spanish to parents of students districtwide to promote the message that new schools and facilities belong to the entire community. The district compiled all name suggestions for special committee review prior to submitting a list of final suggestions to the board for consideration. In September 2004, the board voted to name the next new facilities after a former superintendent and graduate, Mr. Robert Zamora, and posthumously after the 2003 South San Antonio High School valedictorian, Anne Maria Hernandez.

Staff in the Communications and Community Relations Office continues to promote permanent community relations with the community by coordinating media releases and publishing construction updates through internal publications and local announcements. Through these varied advisory committees and media efforts, district administrators encourage integral community involvement in early phases of facility planning and district decision–making as a way to dispel lingering perceptions that the community has little interaction with facilities and construction efforts.

SOUTH SANSATIONAL AWARDS PROGRAM
SSAISD uses a unique program, South Sansational Awards, to celebrate character achievement and

academic successes of fifth grade students and promote a positive transition process for students between elementary school and middle school. In a districtwide, publicized ceremony, the South Sanational awards program pays tribute to top graduating elementary students in a variety of areas. Students receive awards that include Super Citizen, Leadership, Most Improved Student, Outstanding Overall Student, and Excellentia Academia—"A" Honor Roll and Texas Assessment of Knowledge and Skills (TAKS) Master. While many individual elementary and middle schools commend student achievement, this event is publicized throughout the community. In addition, principals, guidance counselors, and administrators use the event to highlight the process of change from elementary to middle school, including available resources and celebrating past successes and promoting the possibilities of future and continued social and academic successes. This process is also unique in its combination of students, parents, staff, and administrators communicating about the elementary/middle school transition through a celebratory platform.

DETAILED FINDINGS
CENTRAL ADMINISTRATION ORGANIZATION (REC. 24)
The current central organization is inadequately staffed and does not address all of the instructional, management, operational, and evaluative needs of the district. The district organization structure disperses instructional responsibilities among several senior administrators and does not provide coverage of significant districtwide functions such as program evaluation. The current organization structure is the result of the administration's attempt to balance the budget by eliminating two of three associate superintendent's positions and consolidating a number of director and assistant director positions into one position. In 2003–04, the superintendent had 18 direct reports including all principals and administrators. This occurred in several departments including Special Education, Accelerated Instruction and Technology. The superintendent has 21 direct reports including 15 principals. This creates such as large span of control that it is difficult to provide the necessary oversight to each individual.

SSAISD's top central administration includes the superintendent and five senior administrators—three executive directors, one administrator responsible for School Support Services, and one administrator for K-12. The administrator for K-12 is primarily responsible for curriculum functions but also currently oversees Technology, Career Education and the two alternative school principals. These functions were overseen by the one remaining

associate superintendent position that is currently vacant and as of August 2004 has been neither eliminated nor filled. There are 14 directors. Director positions include positions that manage large support organizations such as food service as well as instructional specialists that do not manage other positions. There are also eight other positions with districtwide responsibilities including coordinators, Communications and Community Relations officer, the police chief, the assistant director of Food Services and the General Accountant. SSAISD's current organizational structure is presented in **Exhibit 4–2**.

Beginning in 1997–98 the district began a strategy designed to address operating deficits and increase the district's General Fund Balance. The district established a fund balance goal of three month's operating expenditures and, according to several administrators, took several difficult, but essential steps to reach that goal. The district instituted stringent staffing formulas for use in campus staff allocations and froze portions of school and departmental general fund budgets. The district implemented an Early Retirement Incentive Plan to encourage more experienced and higher paid employees to retire. Upon retirement and excluding

most teaching positions, the district did not fill subsequent vacancies but reassigned the associated roles and responsibilities to other employees based on skills and time available. As a result, the district saved $386,000 annually used to meet the established fund balance goal.

However, the district applied this process to all vacant central administrative positions regardless of the position's importance or relevance to the district's instructional program or other key support functions. The board also refused to add any administrative positions regardless of need and resulted in instructional and operational inefficiencies.

Fragmented responsibilities that resulted from a lack of adequate administrative oversight include the following:

▪ The executive director for Human Resources and Student Services is responsible for two student support services—counseling and nursing—while the other instructional support positions report to the executive director for Student Services/Hearing Officer.
▪ Principals for the alternative programs report to the executive director for Student Services/Hearing Officer while the 15 other

EXHIBIT 4–2
SSAISD ORGANIZATION
2003–04
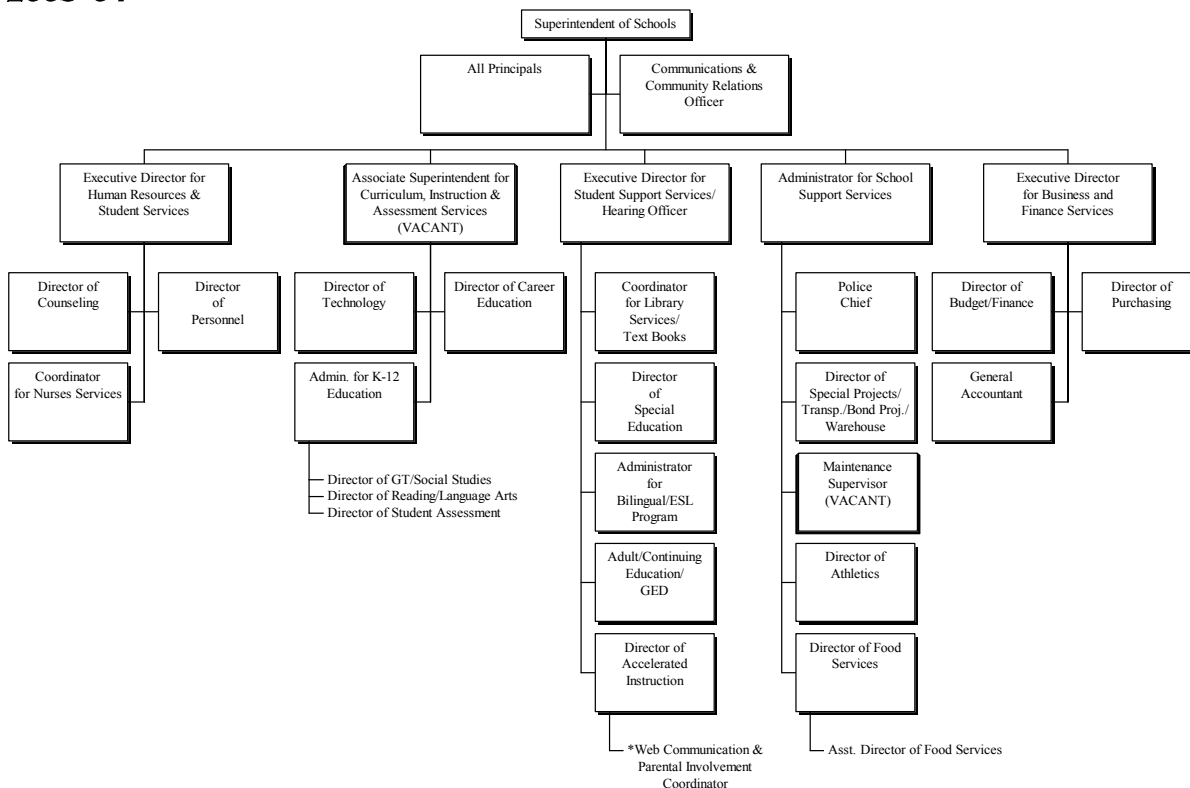
SOURCE: SSAISD, superintendent's Office, May 2004.

principals report directly to the superintendent.

District-level instructional and operational functions that are not performed due to a lack of central personnel include the following:

- There are no central instruction specialist positions responsible for the important core subjects of science and math. Although administration has requested these positions, the board deleted them during the budget process.

- The district does not routinely evaluate instructional programs, other than conducting evaluations required by statue or from grant regulations that are often simple checklists.

- Currently the district does not have a risk manager and has experienced increases in the number and amount of worker compensation claims filed without this position.

SSAISD current staffing levels are similar to the staffing levels in the four other districts selected by SSAISD as peer districts. The peer districts selected include: Harlandale, Edgewood, Mercedes, and Roma ISDs. The comparison was made in several different ways to develop an understanding of how positions are deployed in each district.

Exhibit 4–3 compares overall staffing in SSAISD to its peers. Two of the peers, Mercedes and Roma ISDs, are substantially smaller than SSAISD, so the comparison was made based on the percentage of positions by category in each district. In most categories, SSAISD was very similar to its peers in how it allocated positions across the district. SSAISD had slightly more teachers as a percent of total

staffing and fewer professional support staff than the peer districts. The district had the same percentage of central positions as a percentage of total staffing as its peers (1.1 percent) except for Edgewood that had 0.2 percent of its staff in central administrative positions. SSAISD had a slightly higher percentage of campus administrative positions and fewer auxiliary positions, including clerical positions, than its peers.

The district's lack of a risk manager, however, has been a particular concern of both Business and Human Resource staff and has also resulted in the lack of a districtwide risk management or job safety-training program. The district was declared a hazardous employer in 1999-2000 by the Texas Workers' Compensation Commission (TWCC) and submitted an acceptable accident prevention plan that included review and oversight by a risk manager. A major component of the plan was also to provide job safety training to employees to reduce the number and severity of work related injuries.

When the risk manager left in 2000–01, the district did not officially redistribute the training oversight duties to ensure accountability for provision of training and to promote employee safety. Therefore, the schools and departments began independently and inconsistently providing job safety training.

The district's Workers' Compensation claims have steadily increased after reducing to a low of $435,772 in 2000–01 back to $541,329 in 2002–03, an increase of more than 24 percent, although the number of actual claims has inconsistently increased and decreased since 1998–99. **Exhibit 4–4** presents the Workers' Compensation claims paid by the district

EXHIBIT 4–3
COMPARISON OF TOTAL STAFFING
SSAISD AND PEER DISTRICTS
2002–03

STAFFING TYPE	SOUTH SAN ANTONIO	EDGEWOOD	HARLANDALE	MERCEDES	ROMA
Teachers	672.0	805.6	983.5	336.1	417.7
Professional Support	83.8	185.9	194.3	61.2	48.1
Campus Administration	40.7	41.4	56.1	19.7	25.0
Central Administration	14.8	3.0	25.0	9.0	11.0
Education Aides	176.6	193.3	201.4	128.9	160.5
Auxiliary	373.8	629.0	717.9	265.7	328.9
Total	1,361.7	1,858.1*	2,178.3*	820.6	991.2
STAFF CATEGORY AS PERCENT OF TOTAL					
Teachers	49.3%	43.4%	45.2%	40.9%	42.1%
Professional Support	6.2%	10.0%	8.9%	7.5%	4.9%
Campus Administration	3.0%	2.2%	2.6%	2.4%	2.5%
Central Administration	1.1%	0.2%	1.1%	1.1%	1.1%
Education Aides	13.0%	10.4%	9.2%	15.7%	16.2%
Auxiliary	27.5%	33.9%	33.0%	32.4%	33.2%
Totals	100.0%*	100.0%*	100.0%	100.0%	100.0%

SOURCE: Texas Education Agency, Academic Excellence Indicator System (AEIS), 2002–03.
*Total from AEIS report may not sum to individual staffing due to rounding.

through its self–insurance fund from 1998–99 through 2002–03. In addition to the claims paid, the district has reserved $1.6 million for claims incurred but not paid in 2002–03. This represents an increase of more than $425,000 in reserves from the designated amount in 2001–02.

The district changed third party administrators effective June 1, 2004. The firm chosen provides leading-edge technology for monitoring claims, an aggressive audit and claim handling service, comprehensive reporting capabilities, and the integration of claims and nurse management. The director of Budget and Fiscal Services said the district anticipates that services from the new company will help them reduce the number and amount of claims. As of September 1, 2004, the district still had not hired a risk manager.

Many districts that are self-insured for Workers' Compensation claims hire a risk manager to oversee claims, safety training, follow up with injured workers, and analyze reports prepared by third-party administrators for trends in injuries or by department. Brownsville ISD hired a risk manager, implemented a safety-training program, and saved more than $500,000 or 10 percent of claims after one year.

Many additional school districts also use Early Retirement Incentive Programs and stringent staffing formulas to control personnel costs as SSAISD has done. However, these practices in these other districts are often coupled with a willingness to fill essential or cost-effective positions as needed.

The superintendent should restructure the organization to group similar functions under a single administrator to provide improved direction and accountability and propose the reorganization to the board. **Exhibit 4–5** illustrates the proposed organizational structure that groups functions in a logical manner while maintaining a balance of responsibilities among senior staff. The proposed organization groups all school operations under one position, while grouping instructional and student support functions under a separate administrator. The district should continue to group Finance and Business functions and Support Services functions under separate executive directors. The district should assign Technology and Risk Management to the executive director of Human Resources and

Student Services and change that position's title to executive director of Human Resources and Systems Management. To provide coverage of needed functions, the superintendent should add one senior level administrative position to manage and direct school operations, including supervision of principals. The superintendent should also add one director level position to address program evaluation needs, two curriculum specialists to address math and science core subjects, and a risk manager. These positions should be phased-in as funds permit.

The cost to implement these organizational changes is based upon the mid-point salaries of the recommended positions. The mid-point for the recommended executive director position (pay grade 7) is $65,165. The mid-point (pay grade 5) for the curriculum specialists and director of Program Evaluation is $56,918. Fringe benefits are 10.4 percent of base salaries.

This fiscal impact also assumes that the positions will be phased in over time with the two curriculum specialists hired for one-half of a year in 2004–05 for a salary and benefits cost of $62,838. The estimated salary for a risk manager is $62,838 ($56,918 based on the mid-point of pay grade 5 plus benefits of 10.4 percent or $5,919). The district should be able to reduce the cost of claims by 10 percent of the current claims cost or $54,130 based on the activities of a risk manager. The net annual impact on the district is therefore calculated as $8,708 ($62,838 – $54,130 = $8,708). During the first year, however, this fiscal impact does not include any percentage savings from districtwide risk management expenses. During 2004-05, salary and benefits costs for one-half of a year for the risk manager equal $31,419 ($62,838/2). Total first year costs for the risk manager and two curriculum specialists are rounded and estimated at $94,257 ($31,419 + $62,838).

The district should hire the director of Program Evaluation in 2005-06 and the executive director position responsible for School Operations in 2006–07. Implementation costs during the second year include full year salaries and benefits for the curriculum specialists ($62,838 x 2 = $125,676), the risk manager and a 10 percent program savings estimated at a cost of $8,708 ($62,838 – $54,130 = $8,708), and the addition of the salary and benefits for the director of Program Evaluation ($56,918 x

EXHIBIT 4–4
WORKERS' COMPENSATION CLAIMS
1998-99 THROUGH 2002-03

	1998-99	1999-2000	2000-01	2001-02	2002-03
Cost of Claims	$643,671	$778,374	$435,772	$521,051	$541,330
Number of Claims	168	200	217	199	245

SOURCE: SSAISD, Workers' Compensation claims history, May 2004.

EXHIBIT 4–5
PROPOSED ORGANIZATION

```
                              Board of Trustees
                                     |
                               Superintendent
                                     |
              ┌──────────────────────┴──────────────────────┐
     Communications &                        Student Assessment and
     Community Relations                      Program Evaluation
          Officer                                 Director
                                     |
   ┌──────────────┬──────────────┬──────────────┬──────────────┐
   School          Instructional    Business and     Auxiliary       Human Resources and
   Operations      Support          Finance Services Support Services Systems Management
   Executive       Executive        Executive        Executive       Executive
   Director        Director         Director         Director        Director
```

School Operations — Executive Director
- High School Principals
- Middle School Principals
- Elementary School Principals
- South San Academy Vice Principal
- South San Alternative Vice Principal

Instructional Support — Executive Director
- Director of Curriculum
  - Curriculum Specialists
- Director of Student Services
  - Student Service Coordinators
- Director of Federal Programs
  - Parent Involvement Coordinator
- Director of Special Education
- Director of CATE

Business and Finance Services — Executive Director
- General Accountant
- Director of Purchasing and Warehouses
- Director of Budget

Auxiliary Support Services — Executive Director
- Director of Food Services
- Maintenance Supervisor
- Transportation Supervisor
- Police Chief
- Director of Athletics

Human Resources and Systems Management — Executive Director
- Director of Human Resources
- Director of Technology
- Risk Manager
- PEIMS Coordinator

SOURCE: SDSM, Inc.

1.104 = $62,838) for a total second year cost of $197,222. Third year implementation costs equal year two costs plus salary and benefit costs for the executive director responsible for School Operations ($65,165 x 1.104 = $71,942) or a total of $269,164 ($71,942 + 197,222). The $269,164 in incurred costs should continue on an annual basis for years three through five.

CAMPUS CLERICAL STAFFING (REC. 25)

SSAISD is not consistently using and implementing industry staffing standards for clerks. Clerical staff at the secondary schools exceeds recommended industry standards. SSAISD elementary and alternative school clerical staffing, however, conforms to the Southern Association of Colleges and Schools (SACS) standards. SACS recommends minimum personnel standards based upon the enrollment in a given school and accredits more than 12,000 public and private institutions, from pre–kindergarten through the university level, in 11 states

in the Southeastern United States including Texas. SACS also recommends minimum clerical personnel requirements for middle and high schools, based on enrollment, in its *Accreditation Standards 2000: Resources, Human Resources.* The SACS minimum standards for high schools are shown in **Exhibit 4–6**.

Exhibit 4–7 compares SSAISD staffing to SACS standards at the middle and high school levels. Differences between the SACS standard and actual district positions are shown in the Difference column.

The district should consistently implement clerical staffing formulas at all levels, particularly at the secondary level. Implementing industry formulas such as those produced by the Southern Association of Colleges and Schools, which the district follows at the elementary levels, should help the district reduce the number of clerks at the secondary level by nine and realize overall districtwide savings. The fiscal impact of this finding is conservatively based on the

EXHIBIT 4–6
SOUTHERN ASSOCIATION OF COLLEGES AND SCHOOLS MINIMUM
PERSONNEL REQUIREMENTS FOR MIDDLE AND HIGH SCHOOLS
ACCREDITATION STANDARDS 2000: HUMAN RESOURCES

NUMBER OF STUDENTS	MIDDLE SCHOOLS	HIGH SCHOOLS
1–249	0.5	1.0
250–499	1.0	2.0
500–749	1.5	3.0
750–999	1.5	3.5
1000–1249	2.0	4.0
1250–1499	2.0	4.5
1500–Up	*	4.5

SOURCE: Southern Association of Colleges and Schools, Commission on Secondary and Middle Schools, 2000.
*NOTE: * denotes one full–time equivalent staff member shall be added where needed for each additional 250 students of 1,500.*

EXHIBIT 4–7
SSAISD MIDDLE AND HIGH SCHOOLS
SOUTHERN ASSOCIATION OF COLLEGES AND SCHOOLS
COMPARISON OF STANDARDS FOR CLERICAL STAFFING
TO ACTUAL STAFFING BY SECONDARY SCHOOL

SCHOOL	ENROLLMENT	POSITION	RECOMMENDED SACS STANDARD	ACTUAL NUMBER OF POSITIONS	DIFFERENCE OVER/(UNDER) FROM SACS RECOMMENDED STANDARD
Dwight Middle School	808	Secretaries or Clerks	5.0*	6.0	1.0
Kazen Middle School	817	Secretaries or Clerks	5.0*	7.0	2.0
Shepard Middle School	570	Secretaries or Clerk	4.0*	6.0	2.0
South San Antonio High School (001)	1,765	Secretaries or Clerks	9.0	11.0	2.0
South San Antonio High School West	631	Secretaries or Clerks	6.0	8.0	2.0
Total	4,591		29.0	38.0	9.0

SOURCE: Southern Association of Colleges and Schools, Middle School Standards and High School Standards, SSAISD Salary Listing, 2003–04, and Texas Education Agency, District and School Directory, 2003–04.
*NOTE: SACS recommended half–time positions were rounded up to full–time positions for conservative comparison purposes. SACS clerical standards were also increased by one to address time spent on PEIMS reporting activities in Texas schools.

minimum salary for a clerk in pay grade 1 or $9,712 plus benefits of 10.4 percent to equal $10,722. Annual salary and benefit savings for nine school clerical positions equal $96,498 ($10,722 x 9 positions = $96,498). During the first year, the district should realize savings for five out of a total ten months by reducing staff in January 2005. These first year savings equal $48,249 [($96,498 / 10) x 5]. Five-year savings should reach $434,241 [$48,249 + (4 x $96,498)].

COMMUNITY PARTNERSHIPS (REC. 26)

The district does not have a coordinated approach to address business and community partnership recruitment both within and outside of district boundaries. According to district and campus staff and administrators, the district faces challenges in recruiting business partners since there are only a limited number of businesses within the district's

physical boundaries. While individual district departments and schools have secured important and productive partnerships with various entities, the district is not structured to realize its community and business involvement potential. The superintendent stated in interviews that establishing business partnerships is one of the district's goals through the establishment of an education foundation. The board, however, did not approve the creation of an educational foundation proposed at a board meeting on May 19, 2004.

The Communications and Community Relations Department does not have a defined role in recruiting businesses at the district level or in helping individual schools recruit businesses and sponsors. The district also does not routinely or consistently track its business or community partners. No up-to-date, comprehensive inventory exists of community and business partners in the district. The district does

not tally the amount of money and support received districtwide so it cannot routinely evaluate the effectiveness of its business/community involvement recruitment efforts.

The district's Communications and Community Relations officer currently serves as the single point of contact for all media-related issues. In addition, as of fall 2004, the district's Communications and Community Relations officer is also responsible for processing much of the information on the district's website. The Communications and Community Relations officer and departmental staff also coordinate several special events, including an annual United Way fund collection, Teacher Convocation Day, Veterans Day, Teacher of the Year Award, Employee Recognition Awards, and the South SanSational Program.

While these activities are important aspects of district communications and community involvement, the department's roles have not been defined to include effective business and community recruitment and involvement. As a result, community and business involvement is inconsistent from school to school. For example, Athens Elementary has 33 partners, while Armstrong Elementary has four. Schools do not coordinate routinely with each other or with staff from the Communications and Community Relations Department.

The SSAISD 2003–04 District Improvement Plan (DIP) also does not provide an annual blueprint including goals, objectives and performance measures, for the Communications and Community Relations Department. District goals and objectives also do not include recruiting and retaining business and community partnerships.

El Paso ISD has a comprehensive computerized system that tracks monthly Partners in Education program volunteers, monthly hours, monetary donations, and in–kind services. The program also produces summary reports that central and campus staff review.

Fort Worth ISD's School and Community Relations Department showed its commitment to community involvement by focusing one of the twelve imperatives outlined in its District Improvement Plan on community involvement. The imperative states, "All district personnel will work to forge strong bonds and a working relationship with individuals and organizations throughout the community."

Several school districts have reorganized their communications and community involvement functions to encompass broader goals. These efforts have been based on the growing need to secure

additional private donations and funds, and continued research that shows the positive effects of including businesses and communities in everyday school activities.

The National School Public Relations Association (NSPRA) published a document in 2002 to help school professionals create, fund, and implement school public relations programs. The document, *Raising the Bar for School PR: New Standards for the School Public Relations Profession*, lists the following district community involvement program standards:

- School and district administrators are encouraged to belong to and participate actively in civic and service organizations.

- The superintendent/chief executive officer maintains regular, two-way communication with business, civic, and religious leaders, and other influential members of the community.

- A key communicator program facilitates regular communications with its members and invites them to contact the organization for information or to alert it to misinformation and rumors.

- Community members are regularly sought to serve on school district advisory committees.

- The district uses multiple channels of communication to reach citizens who do not have children in the schools. Opportunities are provided for citizens to ask questions or seek further information. The person with public relations responsibilities is accessible to and visible to the community.

- The organization has an Internet website that is well-constructed, user-friendly, and contains timely information of use to staff, parents, and community members, and helps to recruit future employees and parents/students for the district.

- The district makes regular efforts to communicate with citizens of various cultures who are not fluent in English in ways that seek their involvement, input, and support.

- The organization seeks partnerships with local businesses that provide mentors and other assistance to students and their schools.

- Community views and opinions are sought in periodic public opinion surveys.

Several school districts have implemented a variety of districtwide plans and programs that have significantly increased partnership involvement. For 2004–05, one peer district, Edgewood ISD (EISD), developed a "Plan for Revitalization of Community

Relations Program." That district is asking "all partnerships working with our schools to register and provide a profile of activities for the school year." The Community Relations officer in EISD noted that, "This is necessary in order that both the organization and the school district have a clear vision of goals set for assisting the education process in Edgewood coordinated with the District's Mission, Vision, Belief Statements, and Strategic Planning." EISD's Community Relations Department performs a variety of interrelated activities for the district, business partners, and the community including the following:

- Providing training for organizations and mentors;

- Providing leadership training for parents and organizations;

- Working closely with PTAs and PTOs;

- Acting as a liaison for government affairs;

- Promoting and establishes a Resource Center;

- Coordinating goals and activities with all community organizations working with EISD;

- Coordinating city businesses, student organizations, and city services interested in promoting educational, social, and economic opportunities of the Edgewood ISD community; and

- Creating a full school–community service concept.

In other examples, Hays Consolidated ISD and Dallas ISD coordinate a Partners in Education program. Corpus Christi ISD's Adopt–A–School program draws upon more than 300 area businesses and organizations. Fort Worth ISD established the Chairs for Teaching Excellence Award Program, and since 1982, more than 80 businesses have underwritten an annual outstanding teacher recognition dinner. Businesses raised $55,000 and the district matched funds to establish 11 awards of $10,000. Sometimes, districts located in a metropolitan area but with a limited number of businesses within their physical boundaries organize an Education Foundation or centrally coordinated efforts to solicit partners from large corporations or businesses from nearby cities or counties.

The district should expand the responsibilities assigned to the Communications and Community Relations Department to include actively recruiting both business and community partners. This can be accomplished with existing funds.

COMMUNITY NEWSLETTER (REC. 27)

Today's South San is not consistently published in Spanish and lacks basic publishing elements that make a newsletter inviting and easy to read. The district does not currently have desktop publishing software. The district occasionally publishes the newspaper in Spanish for important topics like bond issues and health-related matters, such as meningitis information. The newsletter does not include a table of contents to help the reader identify areas of interest and does not consistently feature highlighted areas of interest. For example, upon a random review of two newsletters, one included sections titled, "Student Spotlight" and "SSAISD Employee Spotlight," but the other issue did not. These sections were added during 2002–03 but were not present in the 2003–04 issue reviewed. Likewise, one newsletter included a message from the superintendent and from the president of the board, while the other did not.

Hays Consolidated ISD, dedicates a full–time position to this responsibility and produces a quality newsletter, *News and Views,* published in English and Spanish and consistently including information on eight sections found through a table of contents:

- From the Superintendent;

- Transfer Update;

- Education Foundation Update;

- 2004–05 Calendar;

- Parental Involvement;

- News in Brief; and

- District Calendar.

Many districts use desktop publishing software as a cost-effective way to produce easy-to-read newsletters. The Texas School Public Relations Association recognizes school district newsletters in various categories. In 2003, Bandera ISD received a Best of Category award for an internal newsletter from a district with less than 10,000 students. Bandera ISD has also received awards for its external newsletter. Coppell ISD received an award for best external newsletter from a district serving less than 10,000 students. Many of these districts adhere to a standard publishing format that includes basic elements such as a table of contents, standard address from the superintendent, important board and/or district projects, as well as highlighted news items. Districts in areas with a large Spanish-speaking population also regularly publish newspapers both in English and Spanish. Often, these districts take

advantage of internal translators and volunteer translators to assist in these endeavors.

The district should redesign the *Today's South San* publication to include both English and Spanish translations and consistent publication elements and designate a one-time cost of $209 for the purchase of desktop publishing software.

EDUCATION FOUNDATION (REC. 28)
The district does not have an education foundation to take advantage of other sources for raising funds. Education foundations are nonprofit organizations that raise funds for public schools as entities completely independent from yet working with their associated school districts. The superintendent and the Communications officer said that the district proposed establishing an education foundation during the April 21, 2004, board meeting. In May 2004, the board did not approve the proposal.

Increasingly, school districts in Texas and across the nation are establishing education foundations to assist in providing scholarships to students and to increase funds for teacher awards and student programs. In the San Antonio area, Harlandale, Alamo Heights, and Northside ISDs have established education foundations. Other districts such as Galena Park and Galveston ISDs also have education foundations.

Education foundations vary in size, scope, and mission. Harlandale ISD established a 501(c)(3), nonprofit foundation in 1999 that was incorporated with its own board of directors. The Harlandale Education Foundation's mission is to provide scholarships to eligible Harlandale ISD graduates. Since 1999, the Harlandale Educational Fund has raised $478,428 and distributed $429,563. A much larger foundation, the Alamo Heights School Foundation, has given more than $1.6 million to students and programs since 1988.

All foundations include a board of directors, usually composed of important business and community leaders. School staff may also be included on foundation boards. District level investment also varies. In Harlandale ISD, district staff provides support to the foundation and board members are the primary fundraisers. The Alamo Heights School Foundation employs a full–time foundation coordinator. Other arrangements include shared positions in which the foundation and the school district each pay for a portion of a foundation coordinator's salary.

Significant resources are available to help schools start a foundation. The Non–Profit Center of Texas, an agency of the United Way of San Antonio and Bexar County is "a one–stop resource for board

members, staff, and volunteers of nonprofit organizations." Clients range from new nonprofits to established organizations. The center is housed near the district at the Baptist Children's Home, adjacent to Lackland Air Force Base. The initial consultation, intended to define the needs of the nonprofit client, is conducted at no cost to the client. Based on the information provided by the client, Center staff will present a proposal describing the work to be done by the Center and the fees for the service.

The National School Public Relations Association's recent publication, *Dream Big: Creating and Growing Your School Foundation,* gives practical advice on starting and growing school foundations. The book provides:

- Sample mission statements and legal documentation needed to start a foundation;
- The "why's" behind starting a school foundation;
- 15 tips for a prosperous foundation;
- 10 ways to ensure a foundation's success;
- 15 fundraising categories and 10 criteria for evaluating the major fundraising activities for a foundation; and
- Critical administrative and legal steps to earn a foundation's nonprofit incorporation.

The board should authorize the district to create an education foundation. The district should adhere to all applicable laws and regulations when creating the foundation and should include a wide array of community and business leaders on its board.

DISTRICTWIDE VOLUNTEER EFFORTS (REC. 29)
SSAISD does not consistently or centrally track, analyze, and maintain parent and volunteer background information and activities. Although opportunities for involvement exist for volunteers and parents districtwide, such as parent centers in a number of elementary schools, participation in the schools is low. A review of several Campus Improvement Plans also indicates that while there are several strategies for improvement, strategies are not routinely monitored or evaluated. Individual schools keep notebooks logging parent and volunteer activities but do not share this information centrally for summary and analysis to identify participation trends and inequities. Names, home and email addresses, areas of interest, and the results of criminal history checks are also not maintained or available at the district level. One parent noted that it took one school five weeks to obtain a criminal history check. Parents said many volunteers get

discouraged. Volunteer data is gathered for the Safe and Drug Free schools and communities annual evaluation. Numbers are presented for program specific activities as well as those that support the program such as assisting the campus SCFSC coordinators.

Interviews with parents, principals, and district staff indicate that the district does not consistently address volunteer efforts through lack of central coordination. Results by school vary identifying inequitable volunteer distribution at the district's schools. Some principals and parents said that volunteer support is high while others said it was low or absent in their schools. Interviews with parents indicate that a core of a few volunteers routinely supports special events but does not receive central support or assistance. For example, an effort by parents to put up a concession stand at special events to raise money for the school received little to no support from the school and district administration. **Exhibit 4–8** shows that the majority of principals (54 percent), teachers (57 percent), and administrators and staff (46 percent) believe that schools do not have enough volunteers to help students and school programs. Thirty-six percent of parents said that schools do not have enough volunteers.

Participation in the Parent Teacher Association (PTA) is also low in several SSAISD schools. Parents in the Title I/Migrant focus group said that Five Palms, and Carrillo elementary schools do not have PTA organizations. Parents in these schools have tried to institute programs to encourage participation, but have not been successful. Parents said they tried to form a PTA, but could not get help from the schools. PTA members said that, on average, only four to six parents in each school were members of the PTA.

At Armstrong Elementary, the principal said that a new PTA was created in the school in November 2003, after at least three years of effort. At Dwight Middle School, parents said that the PTA is non-functional. The principal at Dwight Middle School said that parent involvement is achieved through the booster club. At South San Antonio High School West Campus, the vice-principal said that the school does not have a PTA. The vice-principals indicated that at the South San Antonio High School, the PTA is not effective and is not involved. Before 2003, the district organized districtwide PTA meetings. PTA members said these were useful and gave parents an opportunity to meet with other district parents. The district no longer organizes these meetings.

Several organizations, such as the Center for Law in Education and the Journal for Bilingual Education have identified successful practices for monitoring and increasing parent and volunteer involvement including the following suggestions:

- Develop a well-organized district-level parental involvement plan.

- Offer more classes at the schools and other community centers and in the evenings.

- Develop partnerships with schools, providing parent involvement tips and help for each school.

- Provide transportation and childcare. Do not view this as an impediment.

- Provide tips for how to enhance PTAs

- Conduct home visits to personalize invitation and to help staff understand parent concerns.

- Offer parents a variety of roles and volunteer activities.

- Offer a range of activities that accommodate different schedules, preferences, and capabilities.

- Make schools, teachers and administrators assess their own readiness for involving parents and determine how they wish to engage and use them.

EXHIBIT 4–8
SSAISD SURVEY – COMMUNITY INVOLVEMENT
MAY 2004

SCHOOLS HAVE PLENTY OF VOLUNTEERS TO HELP STUDENT AND SCHOOL PROGRAMS.				
	PRINCIPALS (N=26)	**TEACHERS (N=340)**	**PARENTS (N=39)**	**ADMINISTRATORS/ STAFF (N= 282)**
Strongly Agree	4%	3%	3%	3%
Agree	27%	22%	39%	21%
No Opinion	15%	18%	15%	28%
Disagree	50%	41%	28%	32%
Strongly Disagree	4%	16%	8%	14%
No Response	0%	<1%	8%	2%

SOURCE: Legislative Budget Board, SSAISD Surveys, May 2004.
NOTE: Responses may not add to 100 due to "no responses" and rounding.

▪ Communicate to parents that their involvement and support makes a great deal of difference in their children's school performance, and that they need not be highly educated or have large amounts of free time for their involvement to be beneficial. Make this point repeatedly.

▪ Encourage parent involvement from the time children first enter school.

▪ Teach parents that activities such as modeling reading behavior and reading to their children increase children's interest in learning.

▪ Develop parent involvement programs that include a focus on parent involvement in instruction, such as conducting learning activities with children in the home, assisting with homework, and monitoring and encouraging the learning activities of older students.

▪ Do not give up. Encouraging parent involvement takes time.

Tracking, monitoring, and analyzing hours and volunteer efforts is an important district function that many districts use to increase community pride and involvement. The Katy ISD website announces," During the 2002–03 school year, almost 12,347 volunteers gave of their time and talents, providing 583,327 hours of service, valued at $9,648,228.50. Katy ISD boasts one registered volunteer for every three students." Through its efforts, Killeen ISD reported in 2001 that the district had 1,800 volunteers that worked 81,860 hours, providing in-kind services valued at $42,579.

El Paso ISD developed a comprehensive computerized volunteer information management system. The database tracks volunteer hours, monetary donations, and in-kind services. Monthly summaries are printed and volunteers are recognized at the end of school year. Schools with the highest participation are rewarded.

Through its Volunteer Connection program, Tyler ISD coordinated all volunteer efforts. The district was able to report more than $600,000 in volunteer contributions. In 1998–99, the district logged 16,777 volunteer hours and more than $251,000 in volunteer contributions. Savings from in-kind donations and volunteer hours are expected to reach nearly $1.2 million over a five-year period.

SSAISD should assign coordination of districtwide parent and volunteer background information and activities to the Parent Development Center and maintain centralized records. The district should develop a list using available spreadsheet capabilities and track, maintain, and analyze the data regarding parent and community volunteers to ensure equitable distribution of volunteers, match parent and volunteer skills with individual campus needs. The Parent Development Center should work with the director of Communications to ensure that districtwide volunteer efforts are publicized in print and on the district's website as a strategy to promote community pride and increase participation.

MIGRANT PARENT ADVISORY COUNCILS (REC. 30)

The Title I and Migrant Parent Advisory Councils (PAC) are not routinely used to solicit input from parents or involve parents in the decision-making process. Title I, Part A Section 118(A) requires that the district will "involve parents in the joint development of the plan." The plan refers to the development of the local school Title I and Migrant education plan. The law stipulates that parents have the opportunity to be part of the decision–making process of how the Title I and migrant education programs are implemented.

Exhibit 4–9 shows the topics discussed at the

EXHIBIT 4–9
TITLE I/MIGRANT PARENT ADVISORY COUNCIL MEETINGS
PARENT DEVELOPMENT CENTER
2003–04

TOPIC	PRESENTER	NUMBER OF PARENTS ATTENDING
Implementation of Title I Program	Parent Development Center Staff	41
Safety	San Antonio Police Department	39
Fire Prevention	Fire Department	36
Secondary Education	Communities in Schools	18
Salsa: Health & Nutrition	Texas Diabetes Institute	27
Adult Education	City of San Antonio Initiative	22
Public Safety Awareness	City Public Service	36
The Four Dimensions of Parent Participation	Intercultural Development Research Association	N/A
Evaluation of Previous Year & Planning for Application of New Federal Program	Parent Development Center Staff	N/A

SOURCE: SSAISD, Parent Development Center, May 2004.
NOTE: N/A denotes scheduled but not yet available.

monthly advisory meetings. These sessions are used to inform parents about programs, but they are not used as planning and decision-making sessions. In a focus group meeting with committee participants, the review team found that the advisory councils are not used to plan Title I or Migrant Education programs. While the sessions were informative, parents felt that they were not included in the planning process.

Meeting minutes indicate that "parents were encouraged to provide feedback and suggestions," but the minutes do not specify ways in which parents provided feedback. The minutes also do not indicate that the parents are directly involved in planning program activities. The meeting minutes indicated that an average of 31 parents attended the monthly meetings.

Though these meetings are not used primarily for planning programs, the district also sends parents to the Parent Advisory Council. Successful parent involvement results when parents are perceived as contributors and collaborators. The district should include parental input in the decision-making process for the Title I/Migrant Parent Advisory Council by developing a schedule for meetings specifically designed to present programs and solicit parental comment at both the beginning and end of each school year. In addition, the district should ensure that it publicizes these meetings to maximize attendance and, therefore, receive the most parental input in regards to these programs as possible.

For background information on District Management and Community Relations, see page 163 in the General Information section of the Appendices.

FISCAL IMPACT

RECOMMENDATION	2004–05	2005–06	2006–07	2007–08	2008–09	FIVE–YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
24. Modify the organization to group like functions, reduce the span of control for the superintendent, and provide coverage of needed central functions.	($94,257)	($197,222)	($269,164)	($269,164)	($269,164)	($1,098,971)	$0
25. Implement enrollment–based staffing formulas for clerical staff at all schools.	$48,249	$96,498	$96,498	$96,498	$96,498	$434,241	$0
26. Expand the Communications and Community Relations Department's responsibilities to include actively recruiting business and community partners.	$0	$0	$0	$0	$0	$0	$0
27. Redesign the district publication *Today's South San* and publish in both English and Spanish.	$0	$0	$0	$0	$0	$0	($209)
28. Establish an education foundation.	$0	$0	$0	$0	$0	$0	$0
29. Assign coordination of districtwide parent and volunteer background information and activities to the Parent Development Center and maintain centralized records.	$0	$0	$0	$0	$0	$0	$0
30. Include parental input in the decision-making process for the Title I/Migrant Parent Advisory Council by designating and publicizing specific meetings at the beginning and ending of each school year for this purpose.	$0	$0	$0	$0	$0	$0	$0
Chapter 4 Total	($46,008)	($100,724)	($172,666)	($172,666)	($172,666)	($664,730)	($209)

CHAPTER 5
FACILITIES MANAGEMENT AND
SAFETY OPERATIONS

The South San Antonio Independent School District (SSAISD) Facilities Department supports 24 schools and administrative facilities totaling 1,581,925 square feet. District schools range in age from four to 56 years old and provided educational space to 9,951 students in 2003–04. The district used a $35 million bond issue in 1999 and a $35.5 million bond issue in 2002 to fund two new schools and provide additions and renovations to existing schools. Voters approved a $40.5 million proposition of a $51 million bond election in June 2004 under the premise that the bonds would only be sold if the district received a majority of the repayment funds from the state's Instructional Facilities Allotment (IFA) program. The district did not receive this funding. Voters did not approve the remaining $10.5 million from the June 2004 bond election that would have been funded from district monies to address items such as sidewalks that are not covered under the IFA program.

The administrator for School Support Services supervises district facilities as well as maintenance, construction, transportation, food service, police, warehouse, athletics, and special project functions. The director of Special Projects/Transportation/Bond Projects/Warehouse, who reports to the administrator for School Support Services, supervises maintenance and custodial functions. For simplicity in the remainder of this chapter, the director of Special Projects/Transportation/Bond Projects/Warehouse is referred to as the director of Plant Operations and the department is referred to as the Maintenance and Operations Department. The SSAISD Police Department has 11 certified peace officers, including the Police chief assigned to each secondary school, with a single, roving patrol officer for each shift. Officers are authorized to write citations for Class C misdemeanor criminal activity, make arrests for more serious criminal activity including assaults with injury and weapons possession, and enforce district policy such as the Dress Code or hallway and bathroom use.

FINDINGS

- SSAISD's Plant Operations management does not adequately plan, budget, or supervise maintenance and custodial activities to ensure clean, well-maintained facilities.

- The district does not use a preventive maintenance program to address ongoing school and grounds maintenance issues and uses bond funds for many routine maintenance repairs.

- SSAISD does not schedule maintenance staff at night when schools are not in use. SSAISD uses a manual work order system rather than an available, no-cost online system and does not gather, assess, and calculate data about maintenance productivity and repair expenses.

- The district does not have an effective and coordinated energy management program that includes energy management goals, related strategies, and subsequent monitoring of utility costs.

- SSAISD does not have a cross-functional safety planning team or designated safety coordinator.

- The district's mechanical rooms are not accessible to maintenance staff and are improperly used for storage of hazardous items.

- The Police Department does not have regular access to criminal history information.

- Police Department procedures and related district policies are not current and do not reflect changes in the field of law enforcement.

- The district does not routinely use random drugs or weapons detection programs to deter their use or possession on school property.

- The Police Department does not have report writing or incident tracking software to efficiently manage its statistics and reporting.

- The district does not use database software to streamline the current truancy process and track case dispositions.

- Clerks do not track truancy cases filed against parents, or ensure related case fines are properly distributed.

- SSAISD does not offer peace officers pay incentives or tuition reimbursement for attaining skills valued by the district.

- The district does not have a process to assist officers in purchasing uniform clothing and equipment.

RECOMMENDATIONS

- **Recommendation 31 (p. 75): Outsource the management of maintenance and custodial functions.** The administrator for School Support Services should identify the district's

maintenance and custodial needs and the expected time frame for achievement prior to competitively bidding and evaluating responses for outsourced maintenance and custodial services. Through board-approved contracted services, the district should improve the quality of districtwide maintenance, enhance the overall condition of schools for students and staff, and realize financial savings.

- **Recommendation 32 (p. 79): Implement a preventive maintenance program.** The district should implement an inclusive preventive maintenance program and series of review checklists that identify the items or systems that are part of the program, equipment locations, frequency and type of inspection required in alignment with any manufacturer suggestions, and an estimated budget amount. By implementing a preventive maintenance program, the district should be able to effectively increase the lifespan of many of its systems and pieces of equipment in a cost-effective manner and reduce reliance on bond funds to reactively address many routine repairs or emergency repairs due to a lack of scheduled maintenance.

- **Recommendation 33 (p. 81): Establish a night maintenance crew.** The district should schedule existing day staff on a night maintenance crew. The crew should be multi-functional including team members from all trade groups found within the Maintenance and Operations Department to cost-effectively complete repairs during times when students and staff are not present. Implementation should increase departmental efficiencies and mitigate potential safety risks to students and staff.

- **Recommendation 34 (p. 81): Activate the online work order system and provide employee training.** The district should implement the Internet-based work order module and associated user training already available at no additional cost through the existing agreement with Region 20. Central, campus, and departmental administrators should then be able to individually monitor the status and costs of repair costs; identify maintenance, safety, and custodial trends; and implement necessary changes to improve cost effectiveness and staff efficiencies.

- **Recommendation 35 (p. 82): Hire an energy manager to develop and implement an effective energy management program supported by board-adopted policy.** A

qualified energy manager should be able to implement and coordinate a districtwide energy management program that results in overall utility savings to the district. The board should adopt energy management policy to provide global and specific goals to guide the overall program. In addition, the district should include the energy manager when developing equipment and/or facility specifications for construction and renovation efforts to address long-term energy efficiency.

- **Recommendation 36 (p. 84): Create a safety team to coordinate strategies and address districtwide safety issues.** The district should establish a cross-functional safety team consisting of representatives from departments that have primary safety and security responsibilities. At a minimum, the committee should include the Police chief, the director of Guidance and Counseling, the disciplinary alternative school principal and the director of Plant Operations.

- **Recommendation 37 (p. 86): Eliminate storage of school items in mechanical rooms and limit access to maintenance staff.** The superintendent should immediately issue a memorandum directing staff to clear all mechanical rooms and directing campus administration to ensure only maintenance staff access these areas. By controlling access and storage of inappropriate materials in mechanical rooms, the district reduces the potential risk of fire or other resulting hazards inhibiting the safety of students and staff.

- **Recommendation 38 (p. 86): Apply for access to the state's criminal history database.** By applying for a link to this database, the district should be able to quickly obtain criminal history background checks and information regarding outstanding warrants enhancing officer safety and reducing budgeted expenses for district job applicants.

- **Recommendation 39 (p. 87): Update police procedures and related district policies annually.** The Police chief should at a minimum update the procedures annually based on a review of federal law and biennial changes to state law such as the Texas Penal Code and the Code of Criminal Procedure. Legal counsel should review district policy and procedural changes before they become effective and prior to board adoption.

- **Recommendation 40 (p. 87): Hire a canine detection company with a history of**

successful drug and firearms detection. The district should research the various programs and success rates of area service providers before selecting a vendor. By researching and contracting with successful vendors, the district enhances the success of these random searches and mitigates the risk of observant students predicting drug searches and modifying their behavior accordingly.

- **Recommendation 41 (p. 88): Develop a truancy database and implement procedures to produce management reports.** The district should use available administrative database software and import student attendance data to produce warning letters, court papers, and other routine correspondence as well as management reports reducing manual tasks and enhancing staff efficiency.

- **Recommendation 42 (p. 89): Develop and implement procedures to file and track truancy cases against parents, and ensure proper disbursement of fines.** Keeping information in a spreadsheet or database program and adhering to developed procedures should provide the district with a more efficient way to monitor potential and filed truancy cases, analyze trends, and follow-up with the courts regarding fines and collections.

- **Recommendation 43 (p. 90): Purchase a police report-writing software program.** The district should purchase and use police report-writing software to streamline suspect identification, cost-effectively track offenses, and produce reports based upon statistical analysis and enhancing overall departmental efficiency. The Police chief should work with the director of Purchasing to identify and purchase this inexpensive and needed software.

- **Recommendation 44 (p. 90): Implement an incentive program for officer training and certification.** The Police chief should work with the executive director for Human Resources and Student Services to analyze and identify the professional certifications that will benefit district operations and provide the basis for a certification pay program. The Police chief should also consider the district's existing manual trades certification program as a benchmark example when developing the officer incentive program.

- **Recommendation 45 (p. 91): Establish a program and accompanying procedures for police uniform and equipment purchases through payroll deductions.** By establishing a payroll deduction program, the district provides Police officers with a mechanism to cost-effectively purchase and reimburse the district for authorized uniforms and equipment.

MAINTENANCE AND CUSTODIAL MANAGEMENT (REC. 31)

SSAISD's Plant Operations management does not adequately plan, budget, or supervise maintenance and custodial activities to ensure clean, well-maintained facilities. Effective management requires detailed planning and allocation of resources, prompt response to daily requirements, consistent supervision and training, and continued monitoring and evaluation of the program. SSAISD's management does not perform these necessary activities in an organized or consistent manner. SSAISD outsourced the management of custodial operations and, according to several custodians, it functioned as a much better program than exists today. **Exhibit 5–1** compares SSAISD management to best practices. A "+" in the status column indicates that SSAISD is performing the function; a "–" indicates it is not performing the function.

The Maintenance and Operations Department does not have Standard Operating Procedures (SOPs), which outline the standard of repair expected, organization charts, work order flow, how to obtain parts and other information necessary for the maintenance worker. Staff relies on verbal instructions and individually defined criterion to determine what is required for job accomplishment. There are also no written standards of cleaning or an inspection program in which district personnel evaluate the campus cleaning effort. The condition of each building reflects the expectations of the building principal and the head custodian. This process results in buildings that range from very clean to unacceptable.

The director of Plant Operations has not developed SOPs that define the flow of work orders in a rapid, organized manner to reduce maintenance down time. Emergency work orders are telephoned to the Maintenance and Operations Department for review and approval by the director of Plant Operations prior to worker dispatch. Routine work orders originate at the campus level in paper form and are sent by distribution to the Maintenance and Operations Department. Once approved, the work orders are held until for scheduled visits to each campus by maintenance personnel resulting in delays for regularly requested repairs. Schools are scheduled for maintenance once every 20 days, regardless of the size or number of repairs needed.

EXHIBIT 5−1
COMPARISON OF SSAISD MAINTENANCE/
CUSTODIAL MANAGEMENT TO KEY SUCCESS FACTORS

SUCCESS FACTOR	BEST PRACTICE	STATUS (+/−)
Planning	Facilities maintenance plan exists with long- and short-term objectives, budget and timelines.	−
	Facilities Department has a vision for maintenance and cleanliness that is shared by stakeholders and is of high priority and supported by administration.	−
	Facilities plan is based on solid analysis and assessment of need.	−
Staff Management	Standard Operating Procedures manual exists to govern day-to-day operations for maintenance and custodial staff. Manual is accessible and easy to read and includes items such as: mission statement, personnel policies, purchasing regulations, accountability measures, cleaning procedures, asbestos procedures, repair standards, vehicle use guidelines, security standards, and work order procedures.	−
	Workload is analyzed as a basis for allocating maintenance and custodial staff and obtaining additional resources as square footage is added.	−
	Orientation and ongoing training in areas such as equipment instructions, safety, and performance expectations is provided for staff.	−
	Staff is closely supervised and developed and routine feedback and evaluation provided.	−
Responsiveness and Preventive Maintenance	Preventive maintenance plans exist and are based on facilities audits outlining the condition of buildings, grounds, and equipment.	−
	Computer Maintenance Management System exists to track preventive and other maintenance costs.	−
	Organization uses flexible work schedules and schedules maintenance and cleaning during non-school hours.	−
	Work order flow is managed to minimize maintenance down time and user frustration.	−
Evaluation	Computer work order systems exist to track workload and responsiveness. Systems allow user to easily evaluate staff productivity and monitor maintenance trends by type of maintenance such as preventive, emergency or routine.	−
	Site inspections are routinely performed and documented.	−
	Maintenance and custodial staff is involved in developing the budget.	−
	Department routinely uses customer surveys to obtain feedback for improvement.	−

SOURCE: National Center for Education Statistics, Planning Guide for Maintaining School Facilities, February 2003.

SSAISD does not schedule staff to effectively accomplish tasks. For example, the district does not schedule night maintenance crews to accomplish the maintenance tasks, depending solely on maintenance performed during school hours. Use of night maintenance crews increases the time available for maintenance without increasing the number of personnel. Not using a night maintenance crew limits the amount and type of maintenance that can be performed without interrupting classroom activities.

Custodial staff is not supervised and communication with supervisors is limited. The district assigns head custodians, whose primary purpose is the management and supervision of the custodians, during the day shift while the majority of the cleaning is conducted at night. Custodians said during focus groups that meetings with head custodians do not occur, and the custodians have no means to convey their concerns to management other than one-on-one conversation with the operation supervisors. The district also purchases cleaning supplies without input from the custodians and based upon cost rather than effectiveness. For example, the district stopped using chemical dispensing systems for cleaning solutions without any input from the custodians. These systems are typically used to increase custodial efficiencies and enhance safety by controlling the amount of cleaning solutions dispensed and eliminating the need to physically pour chemicals that, at times, are hazardous. Many of these systems are still stored in the campus custodian rooms while the district returned to bulk product purchase and use of these cleaning fluids. In addition, many of the actual custodian closets and cabinets containing these materials were found unlocked.

Custodians reported that a formal training program exists to train custodians on cleaning procedures and the proper use of cleaning equipment; yet, training for safety and security issues does not exist.

The district also has not provided the financial resources for effective cleaning or maintenance. For example, the cleaning equipment used by the custodians fails because of excessive age. The district out sources the repair of equipment, which often breaks upon return. One buffer belonging to South San High School was repaired and was broken again three days after its return. There is no spare equipment or loaner equipment to replace equipment being repaired by the contract repair company, so the custodian either doubles up with another custodian or does not perform that cleaning function.

In another example, the district spends less on maintenance in comparison with peer districts chosen for this review: Harlandale ISD, Edgewood ISD, Mercedes ISD, and Roma ISD **(Exhibit 5–2)**. Compared to its peers, SSAISD budgets the least amount per student at $647 per student. SSAISD spends approximately 9.4 percent of the district budget on maintenance, which includes maintenance, custodial operations, and energy expenditures. By comparison, peer districts spend from $665 to $920 per student, ranging from 11.4 percent to 13 percent of their budgets.

The lack of planning, resources, and supervision results in facilities that are unclean and in disrepair as observed during the review team's site visit **(Exhibit 5–3)**.

SSAISD also does not survey its users to obtain feedback for improvement. The review team surveyed teachers, principals, parents and staff in the district concerning maintenance and cleanliness of facilities. **Exhibit 5–4** presents these survey responses.

As seen in **Exhibit 5–4**, parents rated maintenance positively with approximately 50 percent responding that they strongly agreed or agreed that buildings were maintained and repairs occurred timely. Staff and teachers rated maintenance the least positively, with approximately 25 percent of staff and teachers favorably rating maintenance. Responses regarding cleanliness varied. Teachers, students, and staff rated facility cleanliness the least positively with 51 percent of teachers, 48 percent of students, and 44 percent of staff disagreeing or strongly disagreeing with the statement, "Schools are clean." Parents rated the cleanliness the most favorably with 64 percent agreeing or strongly agreeing with the statement.

Many districts outsource maintenance and custodial functions to gain needed managerial expertise in

EXHIBIT 5–2
BUDGETED MAINTENANCE EXPENDITURES
SSAISD AND PEER DISTRICT
2003–04

SCHOOL DISTRICT	STUDENT POPULATION	BUDGET AMOUNT	PERCENTAGE OF DISTRICT BUDGET	AMOUNT PER STUDENT
South San Antonio ISD	9,928	$6,428,228	9.4%	$647
Roma ISD	6,222	$4,136,800	11.4%	$665
Mercedes ISD	5,329	$4,527,000	12.3%	$850
Edgewood ISD	12,873	$11,366,490	12.9%	$883
Harlandale ISD	14,072	$12,944,718	13.0%	$920

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

EXHIBIT 5–3
VISUAL INSPECTION OF SSAISD FACILITIES
MAY 2004

CAMPUS	PROBLEM
West Campus High School	Many broken, missing and mold covered ceiling tiles
	Evidence of excessive roof leaks
	Mechanical rooms contain trash
	Mechanical rooms used as storage
	Many broken floor tiles
	Classrooms in need of painting
Armstrong Elementary	Missing ceiling tiles
	Missing light lens
	Air filters not change on regular schedule
	Dirty tiles adjacent to the supply vent
Five Palms Elementary	Outside of building needs painting
	Front doors needs repair
	Clouded and scratched lexan in windows
Dwight Middle School	Water standing on mechanical room floor
	Mechanical room used for storage
	Main entrance contains cracked glass
Kindred Elementary	Ceiling tiles with mold in hall
	Dirty air filers
	Ceilings stained from dirty air
Palo Alto Elementary	No filters in two air conditioners
	Ceiling in Room 11 black with dirt
Kazen Middle School	Needs painting
	Ceiling tiles with mold
	Chewing gum on floor

SOURCE: SDSM, Inc., visual inspection of selected SSAISD campuses, May 17, 2004.

EXHIBIT 5–4
FACILITY MAINTENANCE SURVEY RESULTS
MAY 2004

SURVEY QUESTION	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
BUILDINGS ARE PROPERLY MAINTAINED IN A TIMELY MANNER.					
Students	3.6%	32.8%	22.6%	22.6%	16.8%
Staff	2.8%	24.8%	16.0%	31.6%	23.0%
Teachers	3.8%	25.0%	7.9%	34.1%	28.5%
Parents	5.1%	48.7%	15.4%	12.8%	12.8%
Principals	0.0%	42.3%	3.8%	42.3%	11.5%
REPAIRS ARE MADE IN A TIMELY MANNER.					
Students	3.6%	15.3%	24.8%	27.7%	27.7%
Staff	2.5%	21.3%	12.8%	34.8%	27.7%
Teachers	2.1%	20.6%	7.9%	36.8%	32.1%
Parents	2.6%	48.7%	15.4%	15.4%	10.3%
Principals	0.0%	26.9%	7.7%	53.8%	11.5%
EMERGENCY MAINTENANCE IS HANDLED PROMPTLY.					
Students	5.8%	32.1%	32.8%	15.3%	13.1%
Staff	7.4%	29.8%	14.5%	25.5%	19.9%
Teachers	4.4%	35.3%	17.1%	27.1%	15.9%
Parents	7.7%	41.0%	17.9%	20.5%	7.7%
Principals	7.7%	46.2%	11.5%	34.6%	0.0%
SCHOOLS ARE CLEAN.					
Students	4.4%	19.7%	27.0%	26.3%	21.9%
Staff	6.4%	33.3%	14.5%	25.5%	18.8%
Teachers	5.9%	34.4%	7.9%	31.2%	20.3%
Parents	7.7%	56.4%	7.7%	7.7%	15.4%
Principals	7.7%	50.0%	3.8%	38.5%	0.0%

SOURCE: SSAISD, School Review Surveys, May 2004.
NOTE: Percentages may not add to 100 percent due to "no responses."

these areas. Coppell ISD out sources both maintenance and custodial management and cites benefits because of the expertise brought to the district by the vendor. The outside company provides the district with SOPs, training, management, and equipment that it could not provide on its own. One example of savings achieved through outsourcing is the reduction in cleaning supply costs. Often a vendor saves at least 10 percent from a district's individual cost of cleaning supplies by using an established network of supplies available at large bulk discounts.

SSAISD should outsource its maintenance and custodial functions. The director of Purchasing should work with the administrator for School Support Services to develop a statement of work. **Exhibit 5–5** outlines some of the items that should be addressed in the statement of work.

To communicate expectations and reduce employee stress, the district should also schedule meetings with district personnel and maintenance and operation employees to explain what is to be expected under the terms of outsourcing the management function. The district should provide a press release to the news media explaining the decision to outsource services and the expected accomplishments. The administrator for School Support Services should work with the executive director for Business and Finance Services and the director of Purchasing to

prepare a Request for Proposal (RFP) to outsource the maintenance and custodial management function. The director of Purchasing and administrator for School Support Services should contact districts that have outsourced the management function to obtain sample copies of their RFP and contract and to discuss "lessons learned" from the implementation.

The district should use the researched information to competitively procure services through the RFP process and complete vendor evaluation using a committee representing a cross section of district and community personnel. The committee should then develop and submit a recommendation to the board for approval. The district should assign immediate contract oversight to the administrator for School Support Services with periodic reports to the director of Purchasing. The administrator for School Support Services should work with the director of Purchasing to review contract terms and performance measures and methods for remedy if the selected vendor does not meet performance measures. Contracts of this type should cover an initial three-year period and provide for review prior to renewal. While outsourcing the management of the maintenance and custodial functions will produce savings of $10,327 annually beginning in 2005–06, the primary reason to outsource the maintenance function is to improve the quality of maintenance work performed in the district and the condition of the schools.

EXHIBIT 5–5
EXAMPLE STATEMENT OF WORK ELEMENTS

TOPIC	ITEMS OF CONSIDERATION
Staffing	Number of vendor maintenance/custodial management personnel Required skills/qualifications of vendor maintenance/custodial management personnel Location of office Hours of management office operations Time frame within which management office will be staffed and operational
Tasks/Program	List the types of tasks/services the vendor is expected to perform such as: Provide department SOPs; Provide department job descriptions; Train staff to use maintenance and cleaning standards and techniques; Provide and implement a computerized maintenance management system; Assess condition of all district facilities and identify immediate, intermediate, and long-term maintenance requirements; and Develop and provide recommended preventive maintenance program for major building components along with an estimated cost for the life of the contract.
Schedules and Deliverables	Documented schedules and deliverable dates for each of the task areas with assigned responsibilities for completion.
Other Issues	Listing of equipment that will be provided and who will replace equipment Identifying who will manage contract Control and escalation factors for multi-year contracts Job pricing for services that are in addition to tasks scoped in contract Costs for key contract items such as chemicals
Management and Reporting	Identification of vendor and district points of contact for contract performance monitoring Scheduled coordination meetings with principals and administrators to communicate program expectations Frequency of status reports Invoice procedures and payment schedule Methods to obtain and incorporate district staff feedback related to vendor performance Regular monitoring points to review and discuss progress such as semi-annual program status reviews Performance measures and procedures for renewal of contract

SOURCE: SDSM, Inc., May 2004.

The cost of outsourcing is estimated as the cost of salaries and benefits for a director, custodial supervisor, and secretary. The base salary cost of the three positions is estimated as $110,000. Fringe benefits of 30 percent and profit of 35 percent are applied for an estimated annual cost of $193,050 ($110,000 x 1.30 benefits x 1.35 profit = $193,050). The cost of outsourcing is offset by estimated savings from the elimination of management and administrative positions in the district. By outsourcing, the district can eliminate four positions—the director of Plant Operations, the maintenance secretary, the maintenance supervisor, and the custodial supervisor.

The actual salaries for the director of Plant Operations and maintenance secretary are $101,141. Fringe benefits of 10.4 percent are applied to the actual salaries for a total savings of $111,660 ($101,141 actual salaries x 1.104 fringe benefits = $111,660).

The actual salaries for the custodial supervisor and the maintenance supervisor are $71,682. Fringe benefits of 27.95 percent are applied to the actual salaries for a total of $91,717 ($71,682 actual salaries x 1.2795 fringe benefits = $91,717). Total savings from elimination of the four positions are estimated at $203,377.

Although the maintenance supervisor is vacant, it is a funded position. The calculation for its savings was estimated as $31,027 based on a mid-point for job grade 7 of $16.16 per hour at 240 days per year ($16.16 per hour x 8 hours a day x 240 days a year = $31,027).

The district should realize estimated savings of $10,327 annually after full implementation based on estimated cost of outsourcing ($193,050) less the savings from the elimination of four positions ($203,377) beginning in 2005–06.

PREVENTIVE MAINTENANCE PROGRAM (REC. 32)
The district does not use a preventive maintenance program to address ongoing school and grounds maintenance issues and uses bond funds for many routine maintenance repairs. Preventive maintenance is described as the routine inspection, adjustment, and repair of major equipment on a regular schedule. There is no preventive maintenance program for HVAC, roofs, plumbing, buildings, grounds, or kitchen equipment. The only activity performed by SSAISD that is similar to preventive maintenance is the changing of air conditioning filters. District personnel, however, do not change them as a scheduled activity but perform the duty according to individual discretion.

During site visits it was noted that the filters at Armstrong and Kindred Elementary were very dirty and needed changing, and the areas around the supply vents were black from dirt flowing over the tiles. At Palo Alto Elementary, filters in one classroom and the teacher's lounge had been removed and the equipment was operated without filters. Similar to Armstrong and Kindred Elementary Schools, the area around the supply vent was black with dirt.

The district's facility condition analysis used in developing projects for the 1999 bond program, repeatedly identified items that many districts employing a preventive maintenance program avoid. For example, the South San Antonio High School West Campus facility condition analysis identified four items needing preventive maintenance—service entrance equipment, distribution equipment, motor control equipment, and lighting quality. The Dwight Middle School facility condition analysis listed filters and corrosion build-up on a cooling tower because there was no preventive maintenance performed. Many districts avoid financing preventive and routine maintenance repairs with bond funds because they are then financed with interest over the life of the bond. For example, many districts designate funds in an annual maintenance budget to address such items as routine electrical inspections that cost far less by paying a technician by the hour or according to contract terms rather than financing repair work due to neglect with accrued interest over the course of 20 or 30 years.

Preventive maintenance improves the facility environment and reduces costs. Preventive maintenance for HVAC systems, for example, contributes to healthy air quality and mitigates any risk associated with poor air quality that may adversely affect students or staff with respiratory problems. Districts using preventive maintenance programs also avoid unnecessary repairs and costs by

performing maintenance routinely and in a proactive manner rather than reactively and in emergency situations. For example, the draft SSAISD Roof Management 10-Year Budget dated April 5, 2004 shows that Benavidez Elementary will require roof repair totaling $18,746 in 2005. Repairs will be corrected at no cost to the district as the roof is under warranty. Benavidez Elementary was opened in 2000. By scheduling and performing preventive maintenance, many districts avoid similar costs early in a new building's life cycle or after installation of a new roof on an existing building.

Many maintenance administrators use information from manufacturer manuals for suggested types of inspections and timeframes to schedule preventive maintenance procedures. Often districts obtain reference materials that provide toolkits and instructions on how to set up a preventive maintenance program. Some available materials and articles include: the U.S. Environmental Protection Agency's Indoor Air Quality Tools for Schools action kit; the Texas Association of School Business Officials monthly Report for March 1997, article entitled "Pay me now or pay me later," which addresses the establishment of a preventive maintenance program; and the National Center for Education Statistics, Planning Guide for Maintaining School Facilities. Districts frequently adapt the information and tools in the reference materials to meet their individual facility and maintenance needs.

Many districts develop and use a series of electronic or manual checklists to assist staff in recording inspections, parts used, labor expended, and repairs completed. Often these checklists are extensions of global preventive maintenance program checklists as shown in **Exhibit 5–6**.

San Angelo ISD implemented a forward maintenance crew that visits each school at least annually and performs preventive maintenance and low priority work orders according to a developed

EXHIBIT 5–6
COMPARISON OF SSAISD GROUNDS KEEPING ORGANIZATIONS
2003–04

MEASURE	MAINTENANCE GROUNDS KEEPING	ATHLETICS GROUNDS KEEPING
Staffing Level	Total Staff: 5 Grounds Crew Chief (1) Grounds keepers (4)	Total Staff: 5 Maintenance Crew Chief (1) Grounds keepers (4)
Equipment	Riding Lawn Mowers (3) Weed Eaters (3) Tractors with shredders (2) Trucks (2) Trailer (1) Chain saw (1), Blower (1)	Riding Lawn Mowers (4) Weed Eaters (8) Tractors (3) Trucks (3) Trailers (3)
Acreage to be maintained	219.0	18.0
Acres per staff maintained	**43.8**	**3.6**

SOURCES: SSAISD, Grounds Crew Chief and Athletics Maintenance Crew Chief, May 2004.

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schedule. The maintenance crew includes staff with mechanical, electrical, carpentry, painting, and plumbing expertise.

The district should establish a preventive maintenance program. To facilitate implementation, the director of Plant Operations should obtain reference materials that provide toolkits and instructions on beginning this type of a program such as those mentioned earlier. The director of Plant Operations should adapt the information and tools in the reference materials to meet the needs of the district and in conjunction with any recommended types of inspections and suggested times for maintenance listed in any of the district's manufacturer manuals. The director of Plant Operations should also develop a customized system of checklists to assist staff during inspections that include parts used, labor expended, and repairs identified and completed. In addition, the director of Plant Operations should work with the executive director of Business and Finance Services to develop associated cost estimates and appropriate inclusion in annual budget submissions. The director of Plant Operations should prioritize projects and inspections by campus and established needs and include adequate budget funding to address these maintenance activities annually.

NIGHT MAINTENANCE CREWS (REC. 33)

SSAISD does not schedule maintenance staff at night when schools are not in use. As a result, maintenance repairs are not completed in a timely manner. Surveys conducted by the review team identified 65.3 percent of principals and 68.9 percent of teachers that agree or significantly agree that repairs are not made in a timely manner. According to the March completed work order report for Armstrong Elementary School, for example, maintenance staff took an average of 17.4 calendar days to complete a requested repair. The report listed a total of 13 completed repairs ranging from three same-day completions to a 45-day completion—March 9, 2004 to January 23, 2004—for hinge replacements on a door.

Although custodians are assigned to both day and night crews and perform a majority of their work during the evening shifts, the district schedules its maintenance staff between 7:30 a.m. and 4:30 a.m. Staff are limited in the amount and type of maintenance that is performed while students and staff are present. Examples of the type of maintenance that cannot safely be performed includes: painting, replacing ceiling tiles, temporarily shutting off power to inspect and repair electrical switchgear, temporarily shutting off water for

plumbing repairs, and replacing broken floor tiles. As a result, this type of work is either postponed until the summer months or addressed on an emergency basis.

The use of night maintenance crews is a recognized industry practice. School districts that have implemented night maintenance crews have seen improvement in the quality of maintenance because of the increased time available to perform maintenance functions without disruption. In 1997, Irving ISD implemented a night maintenance crew to address plumbing, electrical, and general maintenance tasks. The Irving ISD director of Facilities indicated that work order completion rates increased by 25 percent per maintenance person in the first year of implementation. In addition, districts using night maintenance crews also perform tasks such as painting, plumbing repairs, floor and ceiling tile replacements, and electrical work without subjecting students and staff to unnecessary danger and without disrupting instructional time.

The district should immediately implement a night maintenance crew from each of the trades and adjust current schedules to coincide with custodial night schedules. The night shift should include plumbers, electricians, painters, HVAC, and general maintenance personnel as well as a designated crew chief. The crew chief is generally a lead trades person such as a lead plumber. The maintenance supervisor should continue to monitor performance to ensure that work orders are completed promptly. As an incentive to work the night shift, the director of Plant Operations could develop an alternative four-day, 10-hour schedule working Mondays through Thursdays. The director of Plant Operations should work with the executive director for Human Resources and Student Services to ensure that any personnel issues are addressed before the schedule is implemented. The director also needs to coordinate with principals regarding schedules for after-hours access to the buildings. Implementation should increase departmental efficiencies and mitigate potential safety risks to students and staff present during daytime hours.

WORK ORDER SYSTEM (REC. 34)

SSAISD uses a manual work order system rather than available software applications and does not gather and assess data about maintenance productivity and repair expenses. The district generates a monthly board report based upon hand compilations of completed work orders by school but does not maintain, analyze, and monitor a list or include specific information regarding the number, type, and cost of maintenance repairs and resources. Region 20's Internet-based work order module is

capable of these functions and is available with supporting training to the district at no additional charge.

To currently generate a work order request, a campus or department staff member completes a multi-carbon form that includes the date of the request, the name of the requesting school or department, a description of the work to be performed, and an approval line for the director of Plant Operations. The form also contains a section for the Maintenance and Operations Department to insert comments and a budget account to be charged for the subsequent work.

The ability to monitor work orders has many uses. Many Maintenance directors identify the status of work performed and analyze trends through review of electronic work orders. In addition, electronic work order review and generation of subsequent reports are also used for safety and security purposes. For example, when criminal mischief occurs, police contact the Maintenance Department staff and request a restitution amount that reflects repair costs. The cost information is often necessary to determine the appropriate criminal charge. Where no criminal charge is filed, repair costs are then routinely captured.

The Maintenance and Operations Department supervisor said repairing graffiti, broken windows and other acts of criminal mischief means staff must leave waiting work orders to make the emergency repairs. The supervisor estimated the Maintenance and Operations Department staff spends 25 percent of their time repairing criminal mischief but could not readily identify the actual costs in staffing and/or parts associated with these repairs. Without a way to track actual costs, the district cannot determine the effect on budget, resources, and productivity. Many Texas districts use the Internet-based system available through Region 20 to provide management information to departments and administrators on activities that affect school finances.

The district's agreement with Region 20 includes access to the Internet-based work order module and related training at no additional cost. The district should implement this module, provide staff with user training, and ensure campus and departmental administrators have access to view work orders and related information through the system. This online access should provide administrators with the ability to track the status of their work order requests and research historical cost of repairs without having to contact the Maintenance and Operations Department. In addition, the administrator for School Support Services should be able to analyze criminal mischief and/or vandalism trends and

routinely capture associated actual costs to use in future requests from the Police Department. The district should also be able to easily produce management reports based actual data, determine appropriate solutions to identified problems, and link the information to departmental and districtwide finances.

ENERGY MANAGEMENT PROGRAM (REC. 35)

The district does not have an effective energy management program that includes identified energy management goals, monitored utility costs, or coordinated energy management strategies. There is also no formal, written energy management policy. The district had an energy manager through 2001–02 who was responsible for tracking utility invoices. In 2002–03, the district eliminated that position after the individual left the district. Although staff have since presented outsourced energy management programs to the board, they have not been approved.

In 2003, an outside energy company performed an energy review of electric utility invoices, which resulted in limited utility rebates. The district also has replaced older, inefficient equipment during bond program renovations. At 10 campuses, the district replaced 233 air conditioning units and boilers. In addition, the district replaced exterior glass at seven campuses with energy efficient windows. In 1996, the district initially converted fluorescent lights to a more efficient, lower wattage light bulb in all district facilities except Dwight Middle School and the administration building. The district upgraded the remaining lighting in these facilities in 2003. The two newest schools in the district have energy-efficient, direct-digital temperature controls that are set and monitored by computer. However, a large number of district buildings have manual thermostats controlled by individual occupants. The district tries to conserve energy during the months of June and July when most facilities are closed, but does not have procedures or practices in place to ensure that energy conservation occurs.

While the district has implemented some energy management strategies and recognizing that overall utility costs have increased, the district's energy costs have still risen nearly $400,000 since the energy manager resigned. **Exhibit 5–7** identifies the district's actual utility costs for 1999–2000 through 2003–04.

The district cited one reason for increased utility costs as the addition of new facilities. In 2003–04, the district's utility cost was $1.09 per square foot based on a total square footage of 1,581,925. In 2002–03, SSAISD spent $1.5 million or 89 percent of

EXHIBIT 5–7
SSAISD UTILITY COSTS
1999–2000 THROUGH 2003–04

	1999–2000	**2000–01**	**2001–02**	**2002–03**	**2003–04**
Utilities	$1,220,446	$1,511,083	$1,488,706	$1,329,695	$1,726,639

SOURCE: Texas Education Agency, PEIMS, 1999–2000 through 2003–04.

the district's $1.7 million total utility costs on electricity, an amount higher than the average 80 percent for Texas school districts according to state energy managers. Electricity costs during the 2003 summer months of June and July were $282,265 or 18.4 percent of the annual $1,536, 888 total.

SSAISD's current summer conservation practice is to attempt to limit facility use to those campuses that offer summer school programs—two elementary schools and one high school. The director of Plant Operations encourages custodians to keep the air conditioning settings at 78 degrees, but finds that this is not always done. He mentioned instances where he found empty buildings being cooled.

Other school districts are taking aggressive action to reduce energy costs during the summer months of June and July when most facilities are closed. Leander ISD (LISD) is in the third year of a nine-week conservation program that saved $300,000 in energy costs during the summer of 2003 and estimated savings of $350,000 for the summer of 2004. According to the district's energy manager, this savings represents approximately 50 percent of the cost of electricity during these two months. The district limits the number of schools opened to five of 19 regular campuses, only cools the administrative offices and custodial areas at the remaining campuses, and shortens each work week to 8:00 am to 5:00 pm on Monday through Thursday. All administrative offices and most campuses are closed on Friday excluding summer school and day care sites. The district monitors humidity levels in school libraries to protect book collections and sets lights, HVAC, and other equipment controls to unoccupied settings to achieve the greatest reduction in energy costs. Over the last three years LISD has reduced the cost of energy from $1.15 per square foot to approximately $0.80 per square foot through their summer program and additional energy saving measures implemented during the school year.

Many Texas districts have implemented a comprehensive, coordinated energy program, to isolate cost inefficiencies, analyze trends, and identify strategies to reduce overall utility costs. A comprehensive program consists of monitoring utility costs to identify billing errors and areas where there may be faulty equipment or excessive waste; educating users to conserve energy and retrofitting older, inefficient equipment, with newer energy-

efficient equipment. The National Center for Education Statistics Planning Guide for Maintaining School Facilities outlines the following guidelines to help districts achieve more efficient energy management:

- Establish an energy policy with specific goals and objectives;

- Assign someone to be responsible for the district's energy management program, and give this energy manager access to top-level administrators;

- Monitor each building's energy use;

- Conduct energy audits in all buildings to identify energy-inefficient units;

- Institute performance contracting when replacing older, energy-inefficient equipment;

- Reward schools that decrease their energy use;

- Install energy-efficient equipment; and

- Install motion detectors on lights.

Another strategy used by school districts is user education. Watt Watchers is a state-sponsored program that is provided free of charge to school districts. The program challenges students to look for energy waste in their schools. Galveston ISD (GISD) was a pilot site for the Watt Watchers program and reduced its electric bill by $25,000 a year.

The district should implement an energy management program by developing and adopting board policy to identify energy conservation goals and by hiring an energy manager to cultivate and monitor the program. The district should include an aggressive summer energy conservation program in its overall energy program.

The associated fiscal impact includes the cost of an energy manager, summer savings based upon those achieved by Leander ISD with a June 2005 beginning, and an overall programmatic savings of 3 percent achieved incrementally. The district should realize the incremental savings by the third to fifth year of implementation to approximate $1.00 utility cost per square foot by 2008–09.

The cost of the salary and benefits for the new energy manager is based upon comparable positions

classified as job grade 2 within the district. The midpoint for this job grade is $181.70 per day, for 240 days with fringe benefits at 10.4 percent. The salary for an energy manager is estimated at $48,143 ($181.70 x 240 days a year x 1.104 benefits rate) for 2005–06 through 2008–09. First year salary and benefits for the energy manager equal $24,072 ($48,143/2). The summer conservation savings are determined by multiplying the actual SSAISD electricity costs during the summer months of June and July 2003 ($282,265) by 50 percent, the percentage of savings achieved by Leander ISD for an annual estimate of $141,133 ($282,265 X .5 = $141,133). Overall energy savings are based upon the district's 2003 utility cost per square foot of $1.09, calculated as utility costs of $1,726,639 divided by total square footage of 1,581,925. The district should be able to reduce its energy use by 3 percent a year or $51,799 beginning in 2006–-07 (.03 reduction x $1,726,639 = $51,799) after instituting an aggressive energy program for one year. Cost savings are calculated as $144,789 ($141,133+$51,799-$48,143) and will incrementally increase by $51,799 each year.

SAFETY COORDINATION (REC. 36)

SSAISD does not have a cross-functional planning team or a designated safety coordinator. Safety coordination and maintenance efforts are fragmented as a result. In 2003, the district's board adopted an Achievement Plan as a blueprint for the district's overall vision and including the initiation of a District Safety Team. During interviews, staff said the district has not designated a safety coordinator or a cross-functional planning team to coordinate strategies and comprehensively address districtwide safety issues. The superintendent's executive team meets as needed to discuss safety issues, but there is no detailed planning at the departmental level, and this is not a continuing agenda item. As a result, many strategies listed in the Achievement Plan are stand-alone and assigned to single departments.

The plan contains a chapter and an overall safety goal supporting a positive school climate that states, "The district's campuses will maintain a safe and disciplined environment that fosters student learning and elicits a positive public perception in the community." **Exhibit 5–8** shows individual strategies associated with this goal.

Without a coordinated approach, strategies within the same reporting structure are not effectively implemented. For example, the Maintenance Department and the Police Department both answer to the administrator of Support Services. Although the same position manages both departments, Police Department vehicles are not repaired in a timely fashion directly affecting the officers' ability to patrol

in the district. As a specific example, one police vehicle has a broken seatback with an initial repair order placed in 1999. The vehicle seatback was still broken as of July 31, 2004. The district has three patrol vehicles but only two are in operation.

Some strategies are not implemented, such as custodial safety and security training. Other strategies that list multiple departments for implementation do not have a unifying or coordinated approach. For example, one strategy calls for the reduction of drugs and weapons through police interdiction. The Police chief, responsible for implementing the strategy, uses drug sniffing dogs as a standard tool to deter drug activity; however, campus principals control this funding, not the Police chief.

Another obstacle in implementing the district's safety and security strategies is that the budgets to implement the strategies are assigned to organizations that are not responsible for implementation. As an example, another climate strategy calls for a reduction in graffiti and vandalism through increased police patrols. The strategy is enhanced by properly lighting areas to discourage vandals and increase safety for patrolling officers. District police perform security checks and report items such as broken lights and damaged gates to the Maintenance and Operations Department but do not perform routine or comprehensive safety audits. However, the Maintenance Department does not routinely repair the security lighting outside schools because repairs for security lights are budgeted at the school level. In interviews, Maintenance Department staff said if a Maintenance Department worker observes a broken light, the worker will make repairs only if the principal requests it.

Additional safety issues handled by the Maintenance and Operations Department are repair of playground equipment and maintenance of district signs. Maintenance staff, however, do not perform routine checks on playground equipment, but depend on school staff to report broken equipment. A random review of various facilities indicated most playground equipment was new and in good repair. Small repairs noted included an aging merry-go-round that needed additional gravel around its base to fill a small trench made by students at play. A wood climbing-platform at another elementary school was sagging in the middle. Throughout the district, signs were readable, but were at various stages of legibility. Safety markings were bright at some schools, but were fading at other locations.

By its nature, safety and security concerns touch every department in a district. Many Texas districts assign responsibility for safety checks and overall coordination to a particular department, position, or

EXHIBIT 5–8
STRATEGIES/ACTIVITIES FOR MEETING THE SCHOOL CLIMATE GOAL
2003–04

BEHAVIOR MANAGEMENT STRATEGIES	PERSON RESPONSIBLE
Update and distribute the student Code of Conduct to all staff for implementation as the Campus Behavior Management plan.	Executive Director for Student Support Services School Principals
Refer students to alternative education programs or expulsion for violations of the student Code of Conduct. The alternative setting is provided by the school district.	Executive Director for Student Support Services School Principals Vice Principals Teachers
Continue Redirectors Program in all 10 elementary campuses for positive behavior supports.	Director of Special Education
Accurately report misbehavior incidences in the PEIMS 425 Record.	Executive Director for Student Support Services Director of Counseling Campus Vice-Principals Data Processors
INTERVENTION AND PREVENTION STRATEGIES	**PERSON RESPONSIBLE**
Continue to implement the Crisis Plan as outlined in the District Crisis alert System Implementation Plan.	Administrator for Support Services
Continue to provide the Safe and Drug Free Schools (SDFS) curriculum in grades Pre-K to 12 for teacher use in the classroom.	Director of Counseling
Educate elementary, middle, and high school students in crime prevention and drug awareness program.	Police Officers Police chief Director of Counseling
Use a proactive approach by educating the community on crime prevention and awareness.	Police chief Police Officers
Provide prevention/intervention counseling or students who may have involvement with drugs or violence.	Director of Counseling SDFS Program Counselors
SAFETY AND SECURITY STRATEGIES	**PERSON RESPONSIBLE**
Conduct Safety orientation and implementation in Career and Technology (CATE) laboratory classes.	District Safety officer: Safety Training; director of CATE; CATE staff
Certify bus drivers and aides for Cardio Pulmonary Resuscitation (CPR) and First Aid for upcoming school year.	director of Special Projects/Transportation/ Bond Projects/Warehouse
Implement a preventive maintenance program for transportation that includes a schedule for maintenance and a schedule for repairs.	director of Special Projects/Transportation/ Bond Projects/Warehouse
Maintain district police force for the safety of students and employees.	Police chief
Reduce drugs and weapons on campus by visible deterrent patrolling and interdiction program.	Police chief; Police officers
Reduce acts of violence on campus through timely response to situations requiring police intervention.	Police chief; Police officers
Reduce acts of vandalism, especially graffiti in schools and district property through aggressive patrol activity and building checks.	Police chief; Police officers
Conduct miscellaneous projects and structural investigations as needed for schools.	administrator for School Support Services; director of Special Projects/Transportation/ Bond Projects/Warehouse
Initiate and conduct meetings of the District Safety Committee.	administrator for School Support Services; director of Special Projects/Transportation/ Bond Projects/Warehouse; Campus Safety coordinators
Distribute Material Safety Data Sheets to campuses and facilities.	Warehouse supervisor
Conduct annual check to maintain Material Safety Data Sheets.	Warehouse supervisor Custodial supervisor
Conduct annual in-service training for head custodians in order to ensure correct use and mixture of hazardous chemicals.	Custodial Supervisor
Implement a safety plan that will help to create a safe environment and lead to a zero accident workplace.	Campus Safety coordinator
Purchase lifting belts for maintenance and custodial staff and provide safety training.	Personnel Department staff Administrator for Support Services

SOURCE: SSAISD, Achievement Plan, 2003–04.

team to ensure hazards are identified and repairs made in a timely manner. A designated safety coordinator or team often works with maintenance and security administrators as well as campus principals to ensure playgrounds and equipment are maintained, facilities are safe and hazard free, signs and safety markings are legible, and bushes and trees are adequately trimmed.

Galena Park Independent School District (GPISD), for instance, has an advisory committee that brings together district departments, parents, and

community leaders to focus on health and safety issues. The advisory group meets four times a year and consists of various department representatives that address specific safety and security issues and recommend solutions that include input, approval, and related budgeting from all associated parties.

The district should initiate a safety team, as identified in its own Achievement Plan, and immediately begin to assess the listed strategies to determine the stages of implementation. The team should identify performance measures, define communication standards, and set schedules for team meetings and an annual needs assessment. The meetings should minimally include quarterly updates to discuss problems and needs and to addresses safety on an annual and ongoing basis. Annually, the team should perform a needs assessment, which is part of the budget process, to identify safety needs, evaluate the effectiveness of existing programs in meeting those needs, and identify any performance or material gaps. The committee should further use the needs assessment to identify strategies to address gaps between the needs and existing programs. Once strategies have been identified, the committee should coordinate with the executive director for Business and Finance Services to develop costs and performance measures for the strategies. On an ongoing basis, the core team should meet regularly to increase communication and cooperation at the level where the service is provided or the problem first appears. The team should evaluate progress and may revise strategies after identifying new concerns or trends.

MECHANICAL ROOM ACCESS AND STORAGE (REC. 37)

The district's mechanical rooms are not easily accessible to maintenance staff and are improperly used for storage of hazardous items. In many cases the maintenance personnel do not have keys to the approximately 100 mechanical rooms and must find a building principal to gain entrance. In interviews, maintenance staff said that the reason given for not providing them keys was to secure the school items stored there and to prevent lost keys. The review team saw flammable items stored in several mechanical rooms during site visits. For example, South San High School West Campus' gym mechanical room contained track equipment, cardboard, and cleaning rags. The mechanical rooms at three other campuses were dirty and had flammable material and school items stored in them as well.

Storage of these types of items can cause indoor air quality problems and is a safety hazard for maintenance workers and school employees who are

retrieving these items. Mechanical rooms contain natural gas lines, high voltage equipment, and sensitive control equipment. For this reason, many districts limit access to these rooms to trained maintenance personnel. These districts also ensure the designated maintenance staff have keys to provide them with quick access to perform their duties. Flammable materials are also stored in separate, designated areas in accordance with fire and health codes and used chemicals and related materials are appropriately discarded.

The superintendent should immediately instruct all personnel to clear the mechanical rooms and limit access to only maintenance personnel. Since the district has distributed keys over a period of time to these rooms, this fiscal impact is based upon the cost of the interchangeable cores needed to re-key the mechanical room doors. It is estimated that 100 mechanical room doors will require re-keying at a cost of $32 per door for the core with installation by school maintenance personnel (100 room's doors x $32 per door = $3,200).

CRIMINAL HISTORY DATABASE ACCESS (REC. 38)

The Police Department does not have regular access to criminal history information. Although the SSAISD Police Department is a full-service, 24-hour, seven days a week agency, it is not linked to the Texas Department of Public Safety (DPS) criminal database. The district also currently budgets $3,000 annually to purchase criminal history information. The Human Resources Department purchases this information for job applicants through the DPS Internet-based program.

One officer said that criminal history database access is available to conduct a background check or determine if an individual has an outstanding warrant if necessary applications and forms are submitted to DPS or the San Antonio Police Department (SAPD). Because the Police Department does not have this access and uses a different radio frequency than SAPD, an officer must carry a separate radio with the SAPD radio frequency or contact the district's dispatcher to relay these requests.

The DPS database contains information on drivers' licenses, outstanding criminal warrants, and information on arrests and convictions. Full-time law enforcement agencies are permitted to apply for access to this criminal history database. With access, an officer investigating a suspect receives quick information on criminal history, prior arrests, outstanding warrants, and other safety information. Without access, an officer does not know if a suspect has an outstanding warrant or a history of violence,

which affects officer safety. Many of these law enforcement agencies have dedicated computers and phone lines to readily access this available database to improve services rendered, enhance officer safety and awareness, and reduce time delays for information.

Providing a link to the database is an investment for the state, and applicants are approved based on need rather than convenience. The service is provided by satellite, but the policy and/or police agency must have a dedicated telephone line as a back-up link to DPS. An agency approved for access must also provide the computer and printer, as well as a specific piece of software called a 3720 Emulator. The state also has regulations for the use of the system, which must be agreed upon by the requesting police agency. A requesting agency must also get an agency identification number from the Federal Bureau of Investigation. The DPS Training and Publications Office provides agencies with an information packet explaining the process and providing the forms necessary for application.

The district should immediately apply for access to this database to enhance officer safety and provide ready criminal history information. The Human Resources Department staff should then be able to obtain necessary information for applicant background checks from the district's Police Department. The fiscal impact assumes the annual reduction of the $3,000 currently budgeted for criminal histories. The fiscal impact of obtaining access is calculated based on one-time and ongoing costs. The one-time costs for equipment include emulation software ($79), computer ($595), monitor ($647), and printer ($388) for a total of $1,709 ($79 + $595 + $647 + $388 = $1,709).

The cost of a dedicated telephone line is estimated as a recurring cost of $20 per month, or $240 per year. There is no ongoing DPS charge for monthly access. The cost for the remaining years is $240 for the dedicated phone line. The district should achieve annual savings of $2,760 ($3,000 budgeted - $240 phone access costs).

POLICE POLICIES AND PROCEDURES (REC. 39)

Police Department procedures and related district policies are not current and do not reflect changes in the field of law enforcement. In 1993, the district approved a procedure manual for the Police Department. The manual was comprehensive when drafted, covering police response, search and seizure, off-duty employment, approved weapons and ammunition, and other high-risk areas.

Since 1993, several laws have been passed affecting law enforcement. The federal Americans with Disabilities Act (ADA) has been implemented requiring police agencies to be sensitive to physical and mental requirements in their hiring and management practices. State legislation has set monitoring standards for racial profiling by law enforcement officers. Rules regarding statements or confessions by juveniles have changed. Advances in technology have provided new and better enforcement tools. These and other topics are not covered in the existing manual.

Both large and small police forces rely upon policies and procedures to limit liability for police actions. The Austin Police Department, for example, regularly updates its policy manual to ensure officers benefit from the latest standards and guidelines.

The district should annually update the procedures based upon a review of federal and state law such as the Texas Penal Code and the Code of Criminal Procedures. The review and update should consider the following:

- new standards in racial profiling;

- changes in obtaining juvenile confessions;

- new advances in firearms and ammunition;

- new advances in less than lethal force weapons;

- physical standards that may be affected by the ADA;

- sick leave policies that may be affected by the Family Medical Leave Act (FMLA);

- vehicle use and arrest policies that may no longer apply to the current practice of transporting arrestees to the county booking facility;

- grooming requirements that may be affected by equal rights decisions; and

- obsolete references to supervisory positions no longer in the chain of command.

The district should also ensure legal counsel reviews all procedures and policy changes.

DRUG AND WEAPONS DETECTION PROGRAMS (REC. 40)

The district does not routinely use random drugs or weapons detection programs to deter their use or possession on school property. SSAISD has handheld metal detectors and an informal arrangement for use of a drug-sniffing dog upon request. According to staff, both are used when there is an indication that drugs or weapons may be

present at school, but are not used as part of a random, unannounced prevention program. According to records from the canine search company, the district conducted one drug search in May 2002 at a cost of $967 and one in May 2003 for $850. The district did not conduct any searches in 2001 or in 2004.

The handheld metal detectors, once assigned to school police officers, are housed centrally and used for special events like proms or used infrequently as part of weapons search procedure. Although the district occasionally uses drug detection dogs, it does not have a written contract with a canine search company. If a principal believes a drug problem is emerging at school, he or she has the latitude to call the company and request a sweep of the school. In interviews, principals said they call the company as infrequently as once or twice a school year. A memo from the canine search company stated that one search was performed in May 2002 at a cost of $967 and another was performed in May 2003 at a cost of $850. The canine search company could not find any records of any conducted searches in 2001. No searches were performed in May 2004.

The company did not locate any drugs during the two sweeps, although principals suspected the presence of drugs. The effectiveness of random sweeps is a subject of debate among staff in the district. A number of principals stated that the dogs are either not effective, or that the district does not have a drug problem. District police offices reported that although drugs are not detected, drug dogs do provide an alert on possible vehicles on campus that may have drugs in hidden compartments too obscure to find. Weapons (knives) are often confiscated. Some are too small to make an arrest, but still pose a threat of serious bodily injury. When asked, staff consistently referred to the presence of drugs in the district as "no worse than other urban districts." **Exhibit 5–9** compares SSAISD with the two urban peer districts that are located in the San Antonio area.

As shown in **Exhibit 5–9**, SSAISD compares favorably in alcohol and weapons related offenses, but is higher than its urban peers in drug related offenses. SSAISD high school students were surveyed on the availability of drugs in SSAISD schools. Comments included a request to do something about the drug use in the girl's restroom and a statement about public drug use at school.

Many districts use frequent, random canine sweeps as a preventive measure and to avoid a detectable pattern of searches conducted during the same time each year. A successful drug and firearms safety program is also truly random and unannounced to administrators and staff as well as students reducing the risk for inappropriate information sharing. These districts mitigate the risk of observant students predicting drug searches and modifying their behavior accordingly. Some of these companies will train dogs to locate either drugs or weapons, and some companies dual certify their dogs to perform both types of searches. Edgewood ISD uses detection dogs to look for drugs in its schools. Its contract provides for 40 random visits throughout the year at a cost of $4,800.

The district should research the various programs, success rates, and training records confirming the skills of dogs and their handlers of area service providers prior to selection. The district should be able to enhance the success of these random searches and mitigate the risk of observant students predicting drug searches and modifying their behavior accordingly. This fiscal impact assumes SSAISD contracts for a program similar to the Edgewood ISD program with an annual cost of $4,800 and first year costs at one-half that amount for $2,400.

TRUANCY DATABASE (REC. 41)

The district has a manual and labor-intensive truancy process that does not include use of an electronic and easily searchable database. The district uses multi-part forms contained in three-ring binders with truancy case information maintained in a standard word processing application. When a student is absent for three or more consecutive days, schools may refer the student to the truancy office. When the number of nonconsecutive absences approaches the

EXHIBIT 5–9
URBAN PEER DISTRICT COMPARISON OF DRUG OR WEAPONS CRIMES
SECONDARY SCHOOLS
2002–03

DISTRICT	SECONDARY SCHOOL STUDENT POPULATION	SUBSTANCE ABUSE-RELATED OFFENSES	WEAPONS-RELATED OFFENSES	SUBSTANCE ABUSE AS PERCENTAGE OF POPULATION	WEAPONS OFFENSES AS PERCENTAGE OF POPULATION
Harlandale ISD	6,993	90	7	1.3%	0.1%
Edgewood ISD	5,917	73	1	1.2%	0.0%
South San Antonio ISD	4,679	97	0	2.1%	0.0%

SOURCE: *Texas Education Agency, PEIMS, 2002–03.*

statutory definition for truancy, the school will also make a referral to a visiting teacher for truancy follow up. The visiting teachers have access to school software that captures student attendance data. The district also has Access™ database software it uses for administrative tasks that can import information from other sources into the database, as well as arrange and export database information into a desired format.

Personnel at the referring school manually complete the truancy referral on a multi-part form. The form includes a grid where the referring school circles the days the student was absent. The visiting teacher receives the referral information and prepares a warning notice. The warning notice is also produced on a multi-part form and is written in both English and Spanish. The visiting teacher completes the notice by hand and sends it to the truant student's parent(s).

If absences continue, the visiting teacher initiates court proceedings against the student, the parent, or both. The teacher prepares the truancy complaint on a computer and files the complaint in one of two justice of the peace courts. Truancy clerks enter the case information into a standard word processing application then file copies of the paperwork in the three-ring binders.

When a truancy case reaches disposition, clerks update the tracking table with the results and file a copy of the disposition notice in the binder. Binders distinguish the status of the case. For example, if the teacher needs to see paper work on an open case, the teacher would look in the binder marked "pending."

Because the case information is located in a word processing application and not in a spreadsheet or database application, data entered are not easily researched or analyzed and information is not easily located. Visiting teachers could download data from the student information system and import it into Access™. SSAISD should determine average sentences, compare disposition rates for the two courts and report on other management information.

The district should develop a truancy database using available administrative software to import student attendance data and produce warning letters, court papers, and other routine correspondence. Forms that are currently completed by hand could be generated from the database instead. A properly designed database would also allow the district to run management reports.

TRUANCY TRACKING (REC. 42)
Clerks do not track truancy cases filed against parents, or ensure related case fines are properly distributed. Truancy clerks keep information on

charges filed against students. When the student's court case reaches disposition, truancy clerks make a record of the sentence. Clerks do not track dispositions in court cases against parents. The paperwork on a parent case is attached to the paperwork in the student's case and stored in a large binder.

The Texas Education Code §25.093 requires districts to file truancy cases against a parent who does not compel his or her child to attend school. The statute provides that under certain circumstances, the district receives part of the fine money. According to staff, SSAISD has not received any fine money on court cases against parents.

A review of the dispositions on cases filed against parents in 2003–04, revealed the two justice of the peace courts assessed approximately $4,000 in fines. The average fine was $36. The review team hand counted the pending parent cases. Although not all of the paperwork was available for counting, the district had approximately 207 pending parent cases in its case binders.

Although the justice of the peace courts assess small fines, actively pursuing parents who do not compel their children to attend school reinforces parent accountability. North Forest Independent School District (NFISD) files charges against parents, tracks case dispositions, and works with area courts to assure proper disbursement of fines. NFISD is not located in an affluent area, but has an aggressive program for holding parents accountable for their child's attendance. Through court action against parents, NFISD receives approximately $19,000 a year in fine revenue.

The district should review and document any unwritten departmental procedures regarding truancy cases and determine the status of potential and filed truancy cases where a parent has not made sure the student attended school. Visiting teachers may wish to speak with court staff regarding any changes in current procedures. Truancy clerks should include cases against parents in the tracking process. Keeping the information in a spreadsheet or database program and adhering to developed procedures should provide the district with a more efficient way to monitor potential and filed truancy cases, analyze truancy case trends, and follow-up with the courts regarding fines and collections.

Although the district has 207 pending cases with estimated fines of $7,452 based upon an average fine of $36 ($36 x 207 = $7,452), and recognizing statute that requires a split of the fine revenue, the district potentially could obtain $3,726. However, due to the potential for immediate reduction in fines due to

parental compliance, this fiscal impact does not recognize savings.

REPORT WRITING SOFTWARE (REC. 43)

The Police Department does not have report-writing or incident-tracking software to efficiently manage and analyze its statistics and reporting. The police station has a computer with standard office software for word processing and spreadsheet use that is primarily used by the clerk/dispatcher. The Police chief, who does not have a computer, said the five officers stationed at district schools minimally use computers despite having access to them at their assigned schools. One sergeant reported that he has a computer that has enforcement lines available to South San Antonio police officers but the links are blocked. The Police Department prepares a monthly board report that is prepared by manually counting the handwritten reports. The monthly police report takes from four to eight hours to prepare.

SSAISD officers also meet with other officers and district staff to share gang and other intelligence information. Officers do not have the capability to provide analysis and reports electronically.

Police departments of all sizes use computer programs to identify suspects, track offenses, and perform statistical analysis. This analysis often helps to link patterns of activity, identify similarity in elements of criminal activity, and spot common witnesses or common suspects when conducting effective investigations. Creating a professional appearance to information also lends credibility when reports are used in court settings.

The district should purchase report writing and tracking software. This fiscal impact is based upon purchase of commercial software at a cost of $100 per package for six computers—five in the secondary schools, and one in the Police Department office. The total cost is estimated as a one-time cost of $600 (6 packages x $100 per package).

OFFICER INCENTIVE PROGRAM (REC. 44)

SSAISD does not offer peace officers pay incentives or tuition reimbursement for attaining valued skills although providing educational incentives to other staff. For example, certain trade positions, such as plumbers and electricians receive from 52 cents to 70 cents per hour added to their base rate for becoming certified. In 2003–04, the district provided paraprofessionals with stipends and tuition reimbursement to meet the standards of the federal No Child Left Behind (NCLB) Act. The salary scale for teachers recognizes the value of a master's degree with additional pay.

In interviews, the Police chief said the department loses officers in the first few years of employment. Officers start with the district, gain experience and leave for area law enforcement agencies with better pay and opportunities for growth. According to one sergeant, most officers are overly qualified, highly skilled, and under paid. Also officers working nights receive no pay differential. As shown in **Exhibit 5–10**, 38 percent of the officers hired by the district between 1998 and 2003, left within two years.

The state of Texas provides training money to law enforcement agencies. SSAISD spends its training dollars on state mandated peace officer certification courses. Officers desiring additional education or training must pay for the program if there is no remaining balance of state training funds.

Many law enforcement organizations offer incentives for specialty skills to encourage staff to obtain ongoing training and certification. The Texas Commission for Law Enforcement Officer Standards and Education (TCLEOSE) provides certifications in specialty areas such as for juvenile officers. TCLEOSE has also developed educational objectives that allow officers to obtain an intermediate and an advanced peace officer certifications. Often, smaller organizations provide these opportunities to a varied number of officers each year to contain costs yet ensure availability of the added benefits.

EXHIBIT 5–10
SSAISD PEACE OFFICER TURNOVER
1998–2003

HIRE DATE	RESIGNATION DATE	NEW EMPLOYER
07/18/1994	04/03/1998	Immigration and Naturalization Service
10/15/1988	06/14/2000	Northeast ISD
01/11/1993	04/28/2000	Northeast ISD
05/04/1998	11/24/2000	Harlandale ISD
03/27/2000	12/2000	San Antonio Police Department
10/16/2000	06/22/2001	San Antonio Police Department
08/25/2000	06/05/2002	Northside ISD
01/1995, 01/21/2001	12/05/2003	Northside ISD

SOURCE: SSAISD, Police Department, 2004.

This fiscal impact is based upon two of the 10 peace officer positions qualifying for additional pay each year following an approximate one-year certification process. The calculations assume that the district will reward the additional certifications at the maximum rate of $0.70 per hour, which is consistent with the manual trades certification program already in existence at SSAISD.

Salary increase calculations are based upon peace officers that work 260 days or 2,080 hours to equal $1,456 ($.70 x 2,080 hours = $1,456) plus associated fringe benefits of 27.95 percent or $407 ($1,456 additional salary x .2795 = $407). The cost of the additional salary and fringe benefits per individual is $1,863 ($1,456 + $407 = $1,863). Initial costs are incurred in 2006–07 to provide the district time until May 2005 to research and identify the certifications permissible for the incentive pay program and then one year, 2005–06, to allow a peace officer time to complete certification in an identified area. Annual salary and benefits costs will incrementally increase by two peace officers per year equaling $3,726 in 2006–07 (2 x $1,863), $7,452 in 2007–08 (4 x $1,863), and $11,178 (6 x $1,863) in 2008–09 for a five-year cost of $22,356. The Police chief should include identified training and/or registration costs for certification in regularly submitted training budgets incurring no additional costs to the department.

POLICE UNIFORM AND EQUIPMENT PURCHASES (REC. 45)

The district does not have a process to assist officers in purchasing uniform clothing and equipment. The Police Department officer's manual requires officers to wear a uniform shirt and pants, a badge, a metal nametag, a police utility belt, handcuffs and case, and a radio. The district provides these items to new officers and issues used uniforms to officers when possible. There are no replacements, however. If the uniform or equipment wears out, the officer replaces the uniform piece at his or her own cost.

In addition to items initially provided by the district, officers are required to wear other specialty items that they must also pay for themselves. These specialty items include: plain, black smooth-grained leather boots with a round toe, in a military lace-up style, gloves, a firearm, a holster, and an extra firearm clip if the officer's weapon is semiautomatic. Although not mandated, officers also use other authorized equipment to perform their duties. Officers must pay for this equipment themselves. For example, officers sometimes carry an intermediate weapon such as a baton.

During interviews, the review team learned that some officers have had difficulties purchasing uniform and equipment pieces from industry distributors without a district purchase order and/or verification of employment by the district. One officer said the district would not issue a purchase order despite the offer to either prepay or reimburse the district because there was no pre-established procedure to guide job-required purchases paid by individuals.

Exhibit 5–11 estimates the out-of-pocket cost to an SSAISD police officer to purchase required and optional parts of their uniform. The first year uniform investment is 4 percent of the annual salary of a new officer.

Many industries that require employees to provide their own uniforms purchase required uniform pieces and then use a payroll deduction for reimbursement purposes. Police organizations often make arrangements with specialty distributors to provide officers access to competitively priced items and to proactively verify an employee's eligibility to purchase specific law enforcement items from that distributor.

The district should establish a program to control police uniform purchases through payroll deductions that includes specific procedures for use by SSAISD's Police officers. The Police chief should work with the director of Purchasing to obtain formal requests for information from potential vendors and should identify selected vendors as authorized to do business in the district according to SSAISD's purchasing procedures and applicable state and federal regulations or a formal memorandum of understanding. The Police chief should then work

EXHIBIT 5–11
ESTIMATED COST TO OFFICERS FOR POLICE UNIFORM
2003–04

UNIFORM ITEM	REQUIREMENT	APPROXIMATE COST
Boots	Mandatory	$54
Gloves	Mandatory	27
Gun	Mandatory	499
Holster	Mandatory	66
Utility knife	Discretionary	109
Baton	Discretionary	49
	Total	$804

SOURCES: SSAISD, Police Department Officer Manual; and Internet Sales Police Catalogues, 2004.

with Payroll Department staff to establish a payroll deduction program for use by officers as a mechanism to repay the district for purchased items in accordance with any and all applicable state and federal regulations governing payroll deduction programs. In order to control the timing and amount of the deductions, officers should provide a

"shopping list" at the beginning of the year to the Police chief for review and submission to the Purchasing Department for use in bulk purchases.

For background information on Facilities Management and Safety Operations, see page 163 in the General Information section of the appendices.

FISCAL IMPACT

RECOMMENDATION	2004–05	2005–06	2006–07	2007–08	2008–09	FIVE–YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
31. Outsource the management of maintenance and custodial functions.	$0	$10,327	$10,327	$10,327	$10,327	$41,308	$0
32. Implement a preventive maintenance program.	$0	$0	$0	$0	$0	$0	$0
33. Establish a night maintenance crew.	$0	$0	$0	$0	$0	$0	$0
34. Automate the online work order system and provide employee training.	$0	$0	$0	$0	$0	$0	$0
35. Hire an energy manager to develop and implement an effective energy management program supported by board-adopted policy.	($24,072)	$92,990	$144,789	$196,588	$248,387	$658,682	$0
36. Eliminate storage of school items in mechanical rooms and limit access to only maintenance staff.	$0	$0	$0	$0	$0	$0	($3,200)
37. Create a safety team to coordinate strategies and address districtwide safety issues.	$0	$0	$0	$0	$0	$0	$0
38. Apply for access to the state's criminal history database.	$2,760	$2,760	$2,760	$2,760	$2,760	$13,800	($1,709)
39. Update police policies and procedures annually.	$0	$0	$0	$0	$0	$0	$0
40. Hire a canine detection company with a history of successful detection for random drug and firearms sweeps in district schools.	($2,400)	($4,800)	($4,800)	($4,800)	($4,800)	($21,600)	$0
41. Develop a truancy database that can track case dispositions as well as produce documents and reports from entered data.	$0	$0	$0	$0	$0	$0	$0
42. Develop and implement procedures to file and track truancy cases against parents, and ensure proper disbursement of fines.	$0	$0	$0	$0	$0	$0	$0
43. Purchase a police report-writing software program for officers to use.	$0	$0	$0	$0	$0	$0	($600)
44. Implement an incentive program for officer training and certification.	$0	$0	($3,726)	($7,452)	($11,178)	($22,356)	$0
45. Establish a program and accompanying procedures for police uniform and equipment purchases through payroll deductions.	$0	$0	$0	$0	$0	$0	$0
Chapter 5 Total	($23,712)	$101,277	$149,350	$197,423	$245,496	$669,834	($5,509)

CHAPTER 6
COMPUTERS AND TECHNOLOGY

SSAISD's Technology Department consists of one director and four staff. Technology Department duties include: repairing hardware, monitoring and maintaining computer and network security, creating and maintaining hardware and software standards, staffing the help desk, and training teachers to use technology in the classroom. The district has a wide area network (WAN) for the district's educational and administrative operations and local area networks (LANs) at the schools and administrative offices. The district uses Regional Education Service Center XX (Region 20) as an Internet service provider, for mainframe service for the WAN, and as the source of its business and student services applications. The district pays Region 20 for both customer and business services support according to a tiered fee schedule based upon student enrollment. The Technology Department supports the connectivity to the Region 20 mainframe to enable the staff at SSAISD to log onto the system.

FINDINGS

▪ The Technology Department does not have sufficient staffing to address all areas of responsibility including hardware, software, and website training, planning, evaluation, and support.

▪ Personal computer specifications written for the acquisition process are exclusionary and in violation of state law, and the district does not have a written policy requiring the Technology Department to participate in technology acquisition decisions.

▪ SSAISD does not use paid campus-based technology specialists to facilitate integration of technology into the curriculum and to provide first level diagnostic support at each school.

▪ The district does not have adequate maintenance contracts or redundancy to address single points of failure within the system network architecture.

▪ The district provides costly preventive maintenance on equipment that is obsolete or of low value.

▪ The district does not have help desk software to monitor and track help desk activities.

▪ The Technology Department does not provide local application support and training on the Region 20 business and student mainframe computer systems.

▪ The district does not include administrative technology needs or administrative technology representatives in long-range planning.

▪ The district does not include detailed action plans that identify specific tasks and timelines, and link the annual funding to the tasks needed to implement the strategies identified in the long-range technology plan.

▪ SSAISD's disaster recovery plan is incomplete.

RECOMMENDATIONS

▪ **Recommendation 46 (p. 94): Hire software and Web development specialists.** The district should hire a technical specialist to address administrative and student services and a Webmaster/software specialist to address software and administrative training, application support, and Web development and maintenance needs. The district should ensure the job descriptions are either updated or developed to adequately support gaps in training and technical assistance.

▪ **Recommendation 47 (p. 97): Modify the technology acquisition process to include all computer manufacturers and update departmental procedures to require participation by the director of Technology in all computer purchases.** The director of Purchasing and the director of Technology should immediately revise the district's computer standards to eliminate exclusionary specifications that prevent major manufacturers from meeting specifications. The superintendent should also require the director of Technology to participate in all technology purchases and to update written department procedures. Instituting these changes and requiring involvement by the director of Technology in all aspects of computer purchase should help the district consistently comply with purchasing regulations and encourage increased vendor participation.

▪ **Recommendation 48 (p. 98): Recruit and provide stipends to campus-based technology specialists.** The director of Technology should work with campus principals and the executive director for Human Resources and Student Services to develop a program to develop proficiency standards in hardware and software troubleshooting for use in recruiting campus-based technology specialists.

- **Recommendation 49 (p. 99): Evaluate the network architecture to eliminate single points of failure.** The systems specialist should evaluate the network architecture to identify and evaluate each single point of failure to determine whether the most feasible correction is a redundancy solution or an elevated maintenance level. By identifying and correcting these points of failure, the district minimizes potential risk to its technology operational systems.

- **Recommendation 50 (p. 100): Modify the maintenance contract to eliminate maintenance of obsolete or low-value items.** The director of Technology should identify a standard for items that will receive maintenance based on a cost/benefit analysis of obsolescence. By evaluating all computer inventories and providing principals with a list of equipment that will be maintained based on the standard the district enhances overall maintenance cost-effectiveness.

- **Recommendation 51 (p. 100): Purchase and implement a software package to monitor and track help desk activities.** The director of Technology and help desk staff should evaluate available, low cost help desk solutions on the commercial market. The director of Technology should work with the director of Purchasing to select the proper software package using the total cost of ownership process.

- **Recommendation 52 (p. 101): Provide local application support and training on the business and student mainframe computer systems.** The director of Technology should work with representatives from Region 20 to identify desired applications and functional needs already available to the district at no cost. By coordinating and providing related training to identified key users, the district implements new functionality within user departments, institutionalizes system application knowledge, and, coordinates all training activities.

- **Recommendation 53 (p. 101): Include administrative area representatives on the technology committee and develop and include administrative technology objectives and strategies in the district technology plan.** Emphasizing administrative technology will help the district improve its use of technology to streamline many of the functions that affect teachers and administrators such as purchasing, accounts payable, maintenance, and personnel. The director of Technology should expand the technology committee to include representatives from each of the three support

areas: Business and Finance Services, Human Resources and Student Services and School Support Services. The administrative technology representatives should work with the technology committee to update the technology plan to include specific objectives and strategies to reduce paperwork and improve and streamline administrative functions.

- **Recommendation 54 (p. 103): Modify the long-range technology plan to include detailed action plans with annual budget amounts.** The director of Technology and the technology committee should annually modify the district's long-range technology plan to include specific tasks, timelines, and budgeted funds needed to accomplish each approved strategy and help the district improve districtwide technology for students and staff.

- **Recommendation 55 (p. 104): Designate an offsite backup location and include detailed recovery steps in the existing technology recovery plan.** The director of Technology and designated staff should obtain and review other school districts' disaster recovery plans as models to develop additional details for inclusion in the existing district technology plan. By including a designated offsite data location, step-by-step recovery details, and annual mock tests and revisions, the district should be able to successfully complete basic operations and recovery data with minimal losses in the event of an emergency or a disaster.

DETAILED FINDINGS

TECHNOLOGY DEPARTMENT STAFFING (REC. 46)

The Technology Department does not have sufficient staffing to address all areas of responsibility including hardware, software, and website training, planning, evaluation, and support. Technology Department staff in 2003–04 consisted of the director and four support staff including a network administrator, a systems specialist, a hardware specialist, and a help desk secretary that performed specialized duties and assignments. In May 2002 the Technology Department lost a software specialist and as of November 2004, the district is not listing the hardware specialist on its 2004–05 website. During interviews, staff said they do not have enough time to perform all of their required duties or to functionally cross-train to provide each other with internal backup. The Technology Department identified and included the need to hire and maintain additional technical staff in its Technology Plan needs assessment. The director of Technology is not available to participate in planning meetings for

acquiring and evaluating new technology. The Technology Department also does not provide the amount of annual training that it once provided prior to May 2002 when the district had a director and five support staff.

Exhibit 6–1 lists the organization chart provided to the review team in May 2004 that includes a software specialist position that has remained unfilled since May 2002 when that individual became the current director of Technology.

The director of Technology is responsible for supervising staff, planning, grant development, and budget development. The director also provides technology instruction to administrators, teachers, and staff and maintains the district's website. The network administrator manages installation and coordination of networked application software, maintains the web server, and manages the integration of servers. The system specialist installs and maintains software, maintains routers and switches, and assists with installation of equipment. The hardware specialist, no longer listed in November 2004, previously previewed and recommended hardware purchases, performed troubleshooting activities, and installed and repaired hardware systems. The support staff also share responsibilities for disaster recovery. The help desk secretary provides software application and hardware problem assistance over the phone and records and tracks all technology requests.

Prior to May 2002, the district offered summer training in both the mornings and afternoons and after school training during the academic year. Since that time, the director of Technology performs training in the mornings and then manages the department in the afternoon during the summer

months and has been unable to offer routine training during the academic year. During interviews, the director of Technology said that technology training is ad hoc and is not done unless a principal specifically requests it for presentation during a staff development day.

The vacant software specialist position also limits the instructional technology software support that the Technology Department is able to provide. **Exhibit 6–2** lists SSAISD's specialized instructional software for 2003–04. The district uses this software from Pre-Kindergarten through grade five for reading, writing, and math skills. The middle school software for grades six through eight introduces Spanish, accelerated reading, reading assessment, and keyboarding skills. The district has also added additional programming and multimedia software for use in various high school courses.

The director of Technology serves as a part-time Web master in addition to training district staff and managing the department. The review team noted several deficiencies on the SSAISD website (**Exhibit 6–3**). The district said it had contracted with a Web hosting company in April 2004 for training and templates to allow district staff to update website information. In fall 2004, the district also assigned new responsibilities for processing much of the information on the district website to the director of Communication. However, the district still has not hired a specialist with background and training in technical website development and maintenance. In September 2004, the district implemented the new website templates, but as late as November 2004, most of the sites remain incomplete stating that specific information is under construction.

EXHIBIT 6–1
SSAISD TECHNOLOGY DEPARTMENT ORGANIZATION
2003–04
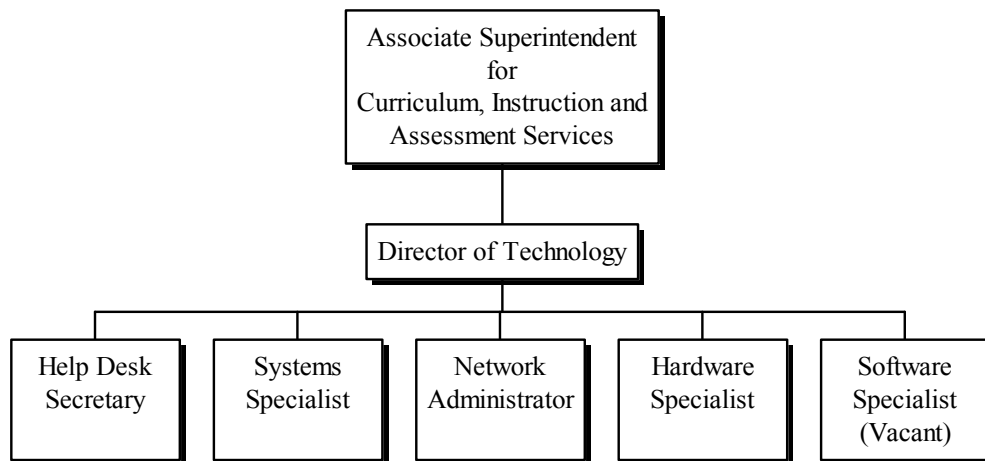
SOURCE: SSAISD, Technology Department, May 2004.

EXHIBIT 6–2
LIST OF SPECIALIZED SOFTWARE 2003–04
SCHOOL PROGRAM SOFTWARE

PROGRAM TITLE	CURRICULUM CONNECTION	GRADE LEVEL
Microsoft Office PRO	Writing, Multimedia, Math	2–12
NSC Learn SME	Reading Skills, Math	Pre–K–3, 6–12
CEI	Reading Skills	Pre–K–3
Sleek	Reading Skills, Math, Writing, Spanish	4–5, 6–8
Accelerated Reader	Reading	1–8
Renaissance Start Reading	Reading Assessment	1–5
Microsoft Encarta	World Geography	1–12
Science Probe Software	Science	6–12
Southwestern Alphabetical	Keyboarding	7–12
Southwestern Numerical	Keyboarding	7–12
Micro–type	Keyboarding	7–8
Kaleidoscope	Keyboarding	7–8
Sunburst Type to Learn	Keyboarding	7–8
Southwestern Micro Type Multimedia	Keyboarding	7–12
Novanet	All core areas	9–12
Microsoft Front Page	Web development	9–12
Macromedia	Multimedia	10–12
Geometer's Sketchpad	Math	9–12
READ 180	Reading	9–12
Photoshop	Multimedia	10–12

SOURCE: SSAISD, Technology Department, April 2004.

EXHIBIT 6–3
SSAISD WEBSITE DEFICIENCIES

ISSUE	EXAMPLES/COMMENTS
Website does not include Spanish translations.	The website does not include any materials for its Spanish-speaking community members.
Website does not inform the public of important events.	2004 bond issue information was not available on the district website beyond a link titled, "Bond Information" that further linked to a page titled, "Foster CM Group, Inc." No description of the proposed bond was ever listed prior to the election. Board agendas and minutes are unavailable. District and Campus Improvement Plans are unavailable. School student/parent handbooks not available. District Improvement Council minutes for 2003–04 are unavailable.
Website does not include information about district's educational programs.	Links are provided to district departments, but only contact information is provided.
Website does not include links for parents, businesses, volunteers, or the community.	Communications and Community Relations Department does not have its own web page.
Information is outdated.	District Improvement Council minutes are listed for 2001. Technology division training calendar is for August 2002. District Improvement Council members are for 2001–02. List of trustees is from May 2003. Department of student assessment information was updated in 2002. Texas Summer Academy provides a description for the 2003 summer program.
School websites do not include sufficient information and are inconsistent.	Only South San Antonio High School and Dwight Middle School provide information other than name, address, and contact information. School websites have different layouts and there are no common links or logo to help users identify the web pages with SSAISD.
School website layouts and designs are hard to read or poorly designed.	One page of the Shepard Middle School website has blue text on a black background, which is difficult to read.

SOURCE: SSAISD, District website, May 2004.

Effective organizations maintain a level of staffing necessary to perform all functions adequately. This staffing level is known as critical mass. Organizations evaluate all duties that need to be performed and then provide a level of staffing to perform the duties as well as provide backup to continue operations in case of absence. The district should hire two additional technology staff providing staff and time for departmental cross training in key areas. A website specialist should help the district develop and support the district's website, allowing the director of Technology the time to resume

management and oversight responsibilities and to participate more actively in technology evaluation and acquisition decisions. The additional software specialist staff position should also allow the Technology Department to provide direction to administrative technology users and provide additional training and assistance so users can learn how to use the applications more effectively.

The board should authorize these positions and the district should reorganize functional assignments. The director of Technology and executive director for Human Resources and Student Services should specify 60 percent of the software specialist job duties on training, 20 percent for review and evaluation of software products, and 20 percent on software diagnostic support. The individual selected for this position should have a combination of technical hardware and software skills as well as the ability to train and effectively communicate how to use the hardware and software. The individual selected for the Web specialist position should have a combination of web programming skills as well as communication and graphic layout skills. The director of Technology should request that the positions and funding be approved in the 2004–05 budget. Once approved, the director of Technology and the executive director for Human Resources and Student Services should develop job descriptions reflecting the desired qualifications and duties for each position. The positions should be advertised, applicants screened and interviewed, and qualified individuals hired as soon as possible. Once the district fills the positions, the director of Technology should develop and implement a training plan to cross train Technology Department staff in all areas. The plan should identify the basic levels of knowledge and skills required for each position with tasks and deadlines to achieve the required skills by the end of the 2004–05. Strategies that should be considered include: using train-the-trainer method during staff development days to share knowledge between staff; sending staff to additional outside training; or even trading jobs for short periods to require staff to become proficient. As new technology is acquired, at least two staff should be trained in the new technology eliminating the need for ongoing cross training except when necessary due to staff turnover.

The fiscal impact to address this need is estimated as the cost of the salary and benefits for the software specialist and web specialist positions. The hardware, network, and systems specialist positions are classified as job grade two which is then used as the basis for the added positions. The midpoint for this job grade is $198.99 per day, with fringe benefits at 10.4 percent. Each new position, therefore would

cost the district $52,724 annually ($198.99 a day x 240 days a year x 1.104 benefits rate) for a total of $105,448. The district should budget for one half of these salaries in year one for a targeted January 2005 hiring date at a cost of $52,724 for 2004–05 and $105,448 each year thereafter for total five year costs of $474,516.

TECHNOLOGY ACQUISITION PROCESS (REC. 47)

Personal computer specifications written for the acquisition process are exclusionary and in violation of state law. Some of the exclusionary bid specifications include requesting a specific model for the motherboard from an identified major technology company, requiring pre-installation of non-vendor supplied software, providing a computer at no charge to the Technology Department for support functions, and requiring the bidder to have a repair facility in the greater San Antonio metropolitan area. The district publishes the equipment specifications and bids twice a year and requires selected vendors to guarantee their terms for 60 days after delivery of personal computers to accommodate any late orders. District staff said during interviews that plans to use more cooperatives in the future to expand potential vendors.

The Texas Education Agency's *Financial Accountability System Resource Guide* prohibits the practice of requiring vendors to be local except for vendors of produce or plants. Similarly, it prohibits the requirement of a particular item unless it can be demonstrated that the item is sole source and a qualified substitute is unavailable. No indication was found that the motherboard must come from a sole source. Besides compliance, restricting the specification can mean the district is paying higher prices for the computers it purchases.

The director of Technology said that individuals within the district generally call to ask about an identified standard, but there is no control mechanism to ensure that technology purchased conforms to the standard or hold personnel accountability this measure. The director of Technology said that principals generally seek input before buying computers, but there is less coordination with director and executive director level administrators.

In addition, the funding for computer workstations is decentralized and located in individual department and campus budgets, so the Technology Department does not control its use. While principals and department heads purchase technology; Technology Department staff is then responsible for supporting and maintaining those purchases whether or not they

conform to identified standards or work with existing systems or software.

For example, the district purchased a time keeping system without looking at the total cost for implementing the system, or total cost of ownership. The Technology Department was not involved in the acquisition process for the system. The Business and Finance Department and the Purchasing Department handled the entire process of investigating the alternatives, working with the vendor to acquire the equipment and software along with the installation. There was no consideration of how the system connected to the network and the resources needed to maintain and support the system over the long-term. Managers who will be using the system received training but Technology Department staff that will be maintaining the system did not received training.

Effective organizations extensively use the skills and knowledge of Technology Department staff by authorizing them to evaluate and acquire the technology that provides the greatest value in terms of performance and cost. These organizations also have comprehensive purchasing procedures that require Technology Department involvement in the implementation and installation of new technology. This allows Technology Department staff to verify the quality of the goods procured and received and to address or mitigate any potential integration issues promoting successful implementation of the technology.

The San Antonio ISD (SAISD) Technology Department actively distributes hardware and software standards and provides guidance to departments considering technology purchases. The Technology Department also distributes procedures on purchases, maintenance, and upgrades of computers and printers. The Technology Department policies and procedures are located on the district's Intranet to communicate the standards to all employees.

Many districts and corporations evaluate computer-purchasing options through the total cost of ownership (TCO) method to evaluate the best value. TCO is a concept by which all costs associated with a capital purchase over a given time period are assessed to determine the best value. The main cost elements of TCO are first cost, installation cost, financing cost, commissioning cost, energy costs, repair costs, and maintenance costs. Other costs that have a bearing on overall value are productivity costs, risk costs, and disposal costs. Often districts include these methods and specific steps for evaluating hardware needs in Technology Department procedures.

The district should modify the technology acquisition process to include all computer manufacturers and include the director of Technology in all computer purchases. The director of Purchasing and the director of Technology should revise the district standards to eliminate exclusionary specifications that prevent major manufactures from meeting specifications and encourage increased vendor participation. In addition, the director of Technology and director of Purchasing should include the TCO method to evaluate future computer purchases. The director of Technology should accordingly suggest modifications and/or rejections for all computer purchases and include evaluations through the TOC method. In addition, the superintendent should ensure the director of Technology is included in all computer purchases. The director of Technology should develop procedures for district staff to follow regarding hardware purchases that include initial investigative work, identification of needs, and the specific processes to follow in adherence with existing purchasing procedures. The procedures should require Technology Department staff and district personnel to work together to define needs before a purchase is requested. The director of Technology should also be the prime investigator for technology acquisitions. The chief user of the technology and other appropriate staff from the user department and the Technology Department should team to evaluate the technology. The team should consider all costs for acquisition, installation, staff time and maintenance for the technology's expected life.

CAMPUS-BASED TECHNOLOGY SPECIALISTS (REC. 48)

SSAISD does not use paid campus-based technology specialists to facilitate integration of technology into the curriculum and to provide first level diagnostic support at each school. The director of Technology said that there has not been a discussion of having campus-based specialists and that there is no stipend or incentive for them to do technology work on their campus. SSAISD currently has volunteer coordinators at each campus.

The director of Technology identified two specific areas of need where campus technology specialists would be valuable: integration of curriculum and technology and to help with troubleshooting. The director of Technology expressed an interest provided examples where campus-based instructional specialists would be valuable such as assisting teachers using new products such as video streaming and video conferencing equipment and the wireless laptop cart. Campus technology specialists could also perform low level troubleshooting such as resolving

network connection problems or installing software from a CD.

Many districts use campus-based technology specialists to provide instruction and first level diagnostic support. Kerrville ISD for example, uses school technologists, a designated teacher in each school, to serve as a technology troubleshooter to help resolve minor technology problems. School technologists, who are available during their conference period and after school, solve a number of problems without having to contact the Technology Department. Their familiarity with handling technology problems also enables them to solve more complex problems with phone support from technology department staff. To enhance the technologist's capabilities, the school technologist will accompany the technician on the service call. The routine and first level technology support provided by the school technologists reduces the number of calls to the Technology Department and provides quicker response to problems.

SSAISD should recruit and provide stipends to campus-based technology specialists. The district should base a stipend for each specialist on the number of machines and staff identified for support at each campus as well as the complexity of the equipment and software applications used at individual campuses. The director of Technology should work with campus principals to define position roles and responsibilities as well as the scope and process for interactions between the technology specialist and the Technology Department. The director of Technology and Technology Department staff should develop basic procedures to be followed for diagnosing and providing primary troubleshooting support. The director of Technology should be responsible for recruiting and identifying appropriate staff, providing basic training, and evaluating performance. Principals should provide input to the director of Technology for performance evaluations.

The fiscal impact for implementing campus technology specialists is based upon a two-tiered stipend for 18 campus technology specialists—$2,500 a year for specialists at middle and high schools and $1,500 a year for specialists at elementary schools—after the district initially obtains board approval for the stipends during 2004–05. The district should annually hire four campus technology specialists beginning in 2005–06—four at the high school and middle school level in 2005–06 and an additional four in 2006–07. The district should then hire four elementary specialists in 2007–08 and an additional four at the elementary level for a total of eight specialists at the elementary and the

middle/high school levels by 2008–09 at an ending annual cost of $32,000 as detailed below:

- 2005–06: four middle/high school technologists x $2,500 per technologist = $10,000;

- 2006–07: eight middle/high school technologists x $2,500 per technologist = $20,000;

- 2007–08: eight middle/high school technologists x $2,500 per technologist + four elementary technologists x $1,500 per technologist = $26,000;

- 2008–09: eight middle/high school technologists x $2,500 per technologist + eight elementary technologists x $1,500 per technologist = $32,000.

SYSTEM NETWORK ARCHITECTURE (REC. 49)

The system network architecture uses modern equipment, but does not have redundancy or adequate maintenance contracts for the single points of failure within the network. The district uses Region 20 as its Internet service provider. This connection through T1 communication lines is used for business processing to the mainframe computer and represents a single point of failure, with no redundancy or backup. Within the SSAISD network there are three other points of failure that can cause network downtime for students, teachers, and staff— the central device for routing data through the network; the firewall, which prevents unwanted intrusions; and the secondary schools' interface point.

Cisco equipment comprises the routing and switching of the data throughout the district where many of these single points of failure exist, and many of these devices are not under warranty. The network could be down for up to one week waiting for repairs if a hardware failure occurs.

The district is aware of the problem and has sent out bids to have the equipment covered that is out of warranty. The coverage includes advance replacement parts, with or without a field engineer, delivered within four hours of determining that a part replacement is required during the standard workweek.

Cisco's® Business Ready Data Center is a cohesive network architecture that supports immediate data center demands such as consolidation, business continuance, and security, while enabling the data center for emerging service-oriented and utility computing technologies such as blade servers, Web services. Through this architecture, Cisco Systems

offers technology and network managers the infrastructure to support a complete and extensive business continuance strategy.

SSAISD should evaluate the network architecture to eliminate single points of failure. The district needs to determine the options that are the most economically feasible in adding redundancy. Redundancy is possible on the Internet by using an additional Internet service provider and not relying on one provider. For firewall, ATM switch and the Cisco networking equipment, having timely maintenance is the most practical solution. The systems specialist should evaluate the network architecture to identify and evaluate each single point of failure to determine whether the most feasible correction is a redundancy solution or an elevated maintenance level. The specialist should then present the evaluations and recommended solutions to the director of Technology.

PREVENTIVE MAINTENANCE CONTRACT (REC. 50)

The district provides costly preventive maintenance on equipment that is obsolete or of little value. The district purchases a three-year warranty with every new computer and uses an umbrella maintenance contract to maintain this equipment after the warranties expire. In 2003–04 for example, the district paid a fixed price, $80,185, through a bidding process, for a preventive maintenance contract covering hardware no longer under initial warranty. This contract included preventive maintenance performed twice a year on servers, workstations, and printers based upon a $25 fee for 3,189 pieces of equipment. Services provided included air dusting and brushing keyboards; air dust and brush air intake and exhaust vents from inside the hardware; run advanced diagnostics on all installed devices; inspect cables for damage, check cable connections; check and monitor for horizontal and vertical alignment, and run virus scan.

The district did not, however, evaluate and/or exclude the cost of maintaining equipment that is obsolete or of low value. The list of maintained equipment includes obsolete 486 computers and first generation Pentium computers. One hundred and six of the listed items were purchased on or before 1997.

The district is also paying for maintenance on low-cost items. For example, one of the items listed for preventive maintenance is an Epson Stylus C62 printer. The replacement price is $66. The preventive maintenance per year is $25. Since the contract price is fixed, the district is paying for the maintenance whether it is necessary or not. The director of Technology does not make the decision to purchase replacement computers, campus principals do.

However, the director of Technology is then responsible for maintaining this equipment.

Effective organizations assess their aging equipment and evaluate whether or not to perform maintenance or to replace the equipment. These organizations will structure contracts on a time and materials basis, rather than fixed price to pay only those repairs that are necessary.

SSAISD should modify the maintenance contract to eliminate maintenance of obsolete or low-value items. The director of Technology should identify a standard for items that will receive maintenance based on a cost/benefit analysis of obsolescence. The standards should consider the age of the device and the unit cost of the device. The director of Technology should evaluate all computer inventories, and provide principals with a list of equipment that will be maintained based on the standard. The director of Technology should work with the director of Purchasing to develop and negotiate a contract based on time and materials for the remaining items on the inventory.

The district should realize savings by removing obsolete and low-cost items from the maintenance contract. The annual savings estimate is based on a review of the 3,189 items listed for warranty. The fiscal impact assumes that the district will reduce the number of items requiring maintenance by 1,626. At a cost of $25 per device, the total estimated savings is $40,650 (1,626 devices x $25 per device = $40,650).

HELP DESK SOFTWARE (REC. 51)

The district does not have help desk software to monitor and track help desk activities. The help desk receives approximately 80 calls per week. One person receives all calls and logs them onto a steno pad. As each problem is resolved, the entries are marked off the pad. If the help desk person cannot resolve the problem, it is turned over to other staff for resolution. The help desk follows up on all issues except hardware issues that become the responsibility of the hardware specialist.

The help desk receives many calls for Microsoft software issues that the help desk considers training issues. There is a non-paid, volunteer technology coordinator at each school. The help desk provides individual training for any coordinator who requests it. The help desk staff indicated a need for an on-line tracking system to centrally log all problems. There is no other way than counting entries in the steno pads to accumulate help desk statistics. These statistics are a leading indicator of technology problems in the district.

Many districts use an inexpensive software package to help staff track outstanding service requests, build

a history of completed work orders, and track support history of equipment. The software allows technology or help desk staff to specify end user entry options, and often has the capability for interface with inventory systems. Districts then analyze support trends, develop strategies to reduce certain types of calls such as recurring software questions, while minimizing data entries.

The district should purchase and implement a software package to monitor and track help desk activities. The director of Technology and the help desk staff evaluate available, low cost help desk solutions on the commercial market. The director of Technology should work with the director of Purchasing to select the proper software package using the total cost of ownership (TCO) process. Once the software is procured, the Technology Department staff installs the software on the help desk staff computer. The help desk secretary enters all personal computers and servers into the equipment database. She then enters all help desk calls into the system.

The fiscal impact is based on a one-time cost for commercially available help desk software at $995.

BUSINESS AND STUDENT SERVICES SYSTEM SUPPORT (REC. 52)

The Technology Department does not provide local application support and training for the Region 20 business and student mainframe computer systems. Staff in the user departments obtain individual training from Region 20 directly and obtain manuals for reference. The mainframe system used for business and student services is located in the Region 20 data center. The system users access the mainframe and their data via the Internet. Although they have on-line entry to the system, much of the system update is in batch mode overnight before some results can be viewed on-line. The SSAISD Technology Department provides connectivity to the Region 20 data center and maintains software necessary for the users to connect to the mainframe.

Region 20 staff support the business and student software applications used by the Curriculum and Instruction, Business and Finance Services, and Human Resource Management and Student Services departments. Region 20 staff also coordinate training and support for implementation of unused program functionality for user departments. The Technology Department does not provide any support for these activities. Historically, district administrative staff use only the major functions of the system. For example, the fixed asset ledger only includes high-cost items. Personal computers are not entered into the system even though the computers must be depreciated.

Many districts working with local Region Education Service Centers also prioritize local training and support to efficiently and effectively maximize mainframe system functionality. Unlike personal computer applications, mainframe systems are efficiently used through significant coordination with data center operations. Districts in this regard often minimize departmental or user coordination efforts to allow those administrators and staff maximum time to perform job-related duties.

SSAISD should provide local application support and training on the business and student mainframe computer systems. The director of Technology should establish a committee with key users of Region 20 software to identify desired applications and functional needs. The committee identifies key users, or "experts" to receive additional training. The director of Technology should then work with Region 20 to establish a training program for the Technology Department staff and designated experts. The Technology Department staff then works with the expert users to develop and implement new functionality and to coordinate all training activities.

The fiscal impact is estimated upon annual $2,500 stipends provided to two experts per year and incrementally increasing by an additional two experts in the second and third years of implementation. The recommendation should begin with a first-year cost of $5,000 (2 x $2,500), a second-year cost of $10,000 (4 x $2,500), and a third-year cost of $15,000 (6 x $2,500). Full stipends of $2,500 should be awarded in the first year to compensate for training. The district should subsequently phase in implementation of this recommendation with annual stipend costs reaching $15,000 and total five-year costs reaching $60,000.

ADMINISTRATIVE TECHNOLOGY PLANNING (REC. 53)

The district does not include administrative technology needs or administrative technology representatives in long-range planning. The district relies heavily on state funding to meet technology issues. The addresses instructional technology needs and planning in the *South San Antonio ISD Technology Plan 2004–07*. A technology committee that consisted of four Technology Department staff, three campus staff, and a retired administrator developed this plan. There is no similar process to address administrative technology needs. For example, there is no technology committee with representation from any administrative technology area such as Business and Finance Services, Human Resources and Student Services, or School Support Services, such as maintenance, transportation, or food services.

The director of Technology said that the technology committee of eight was purposely formed to develop and submit the plan in its new format by the required deadline. Before the development of this plan, the district's technology committee included one representative from each campus (teacher or paraprofessional), but no representation from administrative technology areas. Now that the plan has been sent to the state for adoption, the director of Technology wants to reconvene the larger committee with the 18 campus representatives. She also would like to solicit some parental involvement. There is no plan to expand the existing committee to include administrative technology representatives to address administrative technology planning.

The district's technology plan contains all of the components required for the district to meet TEA submission requirements and to comply with the guidelines outlined in the State Board of Education's *Long-Range Plan for Technology 1996–2010*. It also contains the necessary elements for the district to apply for E-Rate funding and to be eligible to receive Title II Part D, Enhancing Education Through Technology funds. The plan has four major focus areas and nine technology goals as shown in **Exhibit 6–4**.

While the Technology Plan contains 34 objectives and 89 strategies, there is only one objective, 6.6, and one strategy, 6.6.1, that mention support of administrative and student services technology. Strategy 6.6.1 is to maintain a technical specialist to deal with administrative and student services including database development and maintenance, Public Education Information Management System (PEIMS) data, electronic grade book, iTCCS business and student data, cafeteria point of sale (POS), and video services.

The Texas Education Code, §11.252 requires each district to have a District Improvement Plan (DIP). The DIP should include strategies for improvement of student performance that integrate technology in instructional and administrative programs. SSAISD's district improvement plan has a technology goal with 16 strategies. There are no goals associated with administrative technology systems.

Glen Rose ISD has a collaborative planning process that includes representatives from technology, business, curriculum, and campuses. The committee discusses and recommends technology on a school and district level. The committee also solicits input from the district's site-based decision-making committee.

SSAISD should include administrative area representatives on the technology committee and develop and include administrative technology objectives and strategies in the district technology plan. Emphasizing administrative technology will help the district improve its use of technology to streamline many of the functions that affect teachers and administrators such as purchasing, accounts payable, maintenance, and personnel. The director of Technology should expand the technology committee to include representatives from each of the three support areas: Business and Finance Services, Human Resources and Student Services and School Support Services. The administrative technology representatives should work with the technology committee to update the technology plan to include specific objectives and strategies to reduce paperwork and improve and streamline administrative functions.

EXHIBIT 6–4
SSAISD TECHNOLOGY PLAN 2004–07
PLAN ELEMENTS

FOCUS AREA	GOALS
Teaching and Learning	Increase student technology proficiencies to ensure integration of Technology Applications TEKS performance indicators across curriculum. Expand frequency or design of instructional setting using digital content. Increase the availability of online resources to raise the level of academic excellence and foster information literacy.
Educator Preparation	Expand and integrate upon new technology and training for educator effectiveness. Ensure effective use of best practices for technology integration through administrative training and support.
Administration and Support Services	Improve collaboration and cooperation between departments and campuses for effective implementation of instructional goals and objectives.
Infrastructure and Technology	Build community support through collaborative planning, education, and public information through the coordination of school and community resource for technology. Strengthen the infrastructure that will allow students and staff to make use of technology tools necessary for educating students today and in the future. Investigate multiple financial arrangements for securing and maintaining workstations, infrastructure, and other technologies.

SOURCE: SSAISD, Technology Department, South San Antonio ISD Technology Plan, 2004–07.

DETAILED LONG-RANGE TECHNOLOGY PLAN (REC. 54)

The district's long-range technology plan does not have detailed action plans that identify specific tasks and timelines, and link the annual funding to the tasks needed to implement the strategies identified in the long-range technology plan. The technology plan adheres to the requirements set forth by TEA, and includes high-level information such as 3-year budget amounts, start and end dates, and assigned staff. The plan contains an annual budget by category by year with a source of funding as shown in **Exhibit 6–5**.

As seen in **Exhibit 6–5**, the SSAISD Technology Plan depicts budgets for multiple years for each objective. Within each goal, the plan contains a budget amount by objective and lists associated strategies, timelines, person(s) responsible for implementation, and evidence of progress. An example of the budget by objective is shown in **Exhibit 6–6**.

Although the plan includes strategies, a timeline, personnel responsible for implementation, evidence of progress, and a budget by objective, Technology Department staff indicated that detailed action plans did not exist.

Many districts include an action plan with

comprehensive details such as tasks, start and end dates, assigned staff for the following budget year, and associated funding amounts in long-range technology plans. These districts include detailed action plans that link their respective budgets to strategies and associated tasks, often using the tasks as important budget planning, communication, and evaluation tools. Some districts require this level of detail with annual budget submission to communicate how funding will be used and the possible effects if funding is not obtained. The detail also allows the district to assess progress in each strategy and to determine if the funding spent is producing the desired results.

Ricardo ISD, with input from a district technology committee, prepared a detailed technology plan that includes a mission statement, districtwide technology goals, an assessment of achievements and needs, action plans with timelines necessary for objective implementation, and estimated budget requirements for each objective. Ricardo ISD's technology goals include such objectives as faculty, student, and staff computer literacy; and the supply or existence of adequate equipment, resources, physical environment, policies, and departmental procedures to support the technology plan. The district also assigns individual responsibility for implementation

EXHIBIT 6–5
SSAISD TECHNOLOGY PLAN BUDGETS
2004–05 THROUGH 2006–07

BUDGET ITEM	COST	FUNDING SOURCES WITH AMOUNT PER SOURCE
BUDGET YEAR 2004–05		
Staff Development	$31,250	Title II Part D, 100%
Telecommunications and Internet Access	$492,537	General Fund 5%, Technology Department budget 5%, E–Rate 90%
Materials and Supplies	$132,500	Technology Allotment 100%
Equipment	$1,147,796	School Facilities Assist Program 2%, 2002 Bond fund 5%, E–Rate 90%, Technology Allotment 3%
Maintenance	$93,750	Technology Department Budget 25%, Title II Part D 75%
Miscellaneous Expenses	$426,595	Technology Department Budget 50%, General Fund 50%
Total	**$2,324,428**	
BUDGET YEAR 2005–06		
Staff Development	$31,250	Title II part D, 100%
Telecommunications and Internet Access	$492,537	General Fund 5%, Technology Department budget 5%, E–Rate 90%
Materials and Supplies	$132,500	Technology Allotment 100%
Equipment	$132,500	School Facilities Assist Program 25%, 2002 Bond fund 25%, Technology Allotment 50%
Maintenance	$93,750	Technology Department Budget 25%, Title II Part D 75%
Miscellaneous Expenses	$426,595	Technology Department Budget 50%, General Fund 50%
Total	**$1,309,132**	
BUDGET YEAR 2006–07		
Staff Development	$31,250	Title II part D, 100%
Telecommunications and Internet Access	$492,537	General Fund 5%, Technology Department budget 5%, E–Rate 90%
Materials and Supplies	$132,500	Technology Allotment 100%
Equipment	$132,500	School Facilities Assist Program 25%, 2002 Bond fund 25%, Technology Allotment 50%
Maintenance	$93,750	Technology Department Budget 25%, Title II Part D 75%
Miscellaneous Expenses	$426,595	Technology Department Budget 50%, General Fund 50%
Total	**$1,309,132**	

SOURCE: SSAISD, Technology Department, and South San Antonio ISD Technology Plan 2004–05 through 2006–07.

tasks, sets completion deadlines, and includes measurements to evaluate progress towards technology goals.

SSAISD should modify its plan to annually include details such as tasks, timeline, and budget needed to accomplish each approved strategy in the long–range technology plan. The technology committee should also include administrators so that administrative ideas on reducing paperwork are included in the action plan. The action plan for accomplishing the tasks should include a task description, a start date, a completion date, assigned staff and associated budget amount. It should also include measures to track progress. The action plan is submitted to the executive director for Business and Finance Services as part of the budget submittal each year. The director of Technology and technology committee should evaluate and provide quarterly reports to the superintendent and board on the progress of completing tasks in the action plan. The director of Technology should post the progress reports on the district's website to inform the board, district employees and community members about the district's progress in achieving its technology goals and objectives.

DISASTER RECOVERY PLAN (REC. 55)

SSAISD's disaster recovery plan is incomplete. The information in the plan is generic, does not include specific details for accomplishing recovery tasks, and does not identify an offsite storage location for backup data. Although the plan includes vendor names and telephone numbers, there is no reference to a contract or acknowledgement as to the detailed responsibility the vendor has in the recovery process. There is no mention of backup data tapes or means to retrieve the data.

The *Disaster Recovery Plan for South San Antonio ISD* contains the following sections:

- Overview;

- Assumptions;

- Incidents Requiring Action;

- Contingencies;

- Recovery Team Design;

- Incident Preparation;

- Software Safeguards;

- Recovery Procedures;

- Physical Safeguards;

- Network Security Issues; and

- Microcomputer Recovery.

The level of detail in the plan, however, does not provide the appropriate detail to help staff get the district operating within a short period of time in the event of an emergency or a disaster.

Many school districts make reciprocal arrangements for backup data storage with neighboring districts, local businesses, or their region service centers. To successfully test a disaster recovery plan, many districts and businesses complete daily or weekly backups and periodically run a mock disaster drill to ensure that data stored at the designated alternate location is assessable and allows staff to run basic operations within a specified timeframe. These plans often include detailed accompanying steps in a separate manual section such as a Business Continuance Section. Among these are complete instructions for scheduled backups on tape or other media, identification of personnel responsible for taking the materials to the backup location, and necessary steps for backup data retrieval. These entities also develop and then cite agreements with telecommunication carriers to immediately correct any problems on a priority basis and ensure the availability of replacement equipment if necessary. In addition, many districts have board-approved emergency policy to allow emergency expenditures outside of the bidding process with existing providers and on an expedited basis.

Avaya, Inc., for example, has a business continuity practice that provides for routine review of steps necessary to keep the business in operation in the event of an emergency. The review is organized and covers the following areas:

- Business Continuity Policy Review – Review of the overall policies that guide the disaster recovery process and program to keep the business in continuous operation.

- Business Impact Analysis – Review of the impact of a variety of interruptions on the daily operations of the business.

- Physical Threat Assessment – Review of the physical risks that may threaten a business, such as extreme weather conditions like hurricane or flood.

- Security Assessment – Check of the business capability to withstand both external and internal vulnerabilities.

- Current Recovery Plans and Processes – Review of the thoroughness and details included in the organizations current business continuity program and disaster recovery plans. This includes a review of all written documentation

and actual practices. This review also includes all third party support contracts.

Glen Rose ISD's comprehensive disaster recovery plan includes emergency contacts for Technology Department staff, district administrators, and software and hardware vendors and includes protocols for both partial and complete recovery and restoration activities. The plan also includes system redundancy and fault protection protocols as well as a tape backup plan.

The SSAISD director of Technology should work with the superintendent, executive directors, and campus administrators to review existing overall disaster policies for the district and present amendments to the board that include coordinated

technology activities. The director of Technology should also explore possible offsite data storage locations including arrangements with local businesses, neighboring districts, or Region 20. The district should include this designated location, enhanced details about existing vendor contracts and vendor roles in disaster recovery executions, and step-by-step details outlining all necessary operations to minimize data loss and get district operations running smoothly as quickly as possible in the event of an emergency. In addition, district staff should annually conduct a mock disaster test and update the district's technology disaster recovery plan as necessary.

For background information on Computers and Technology, see page 164 in the General Information section of the Appendices.

FISCAL IMPACT

RECOMMENDATION	2004–05	2005–06	2006–07	2007–08	2008–09	FIVE–YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
46. Hire software and Web development specialists.	($52,724)	($105,448)	($105,448)	($105,448)	($105,448)	($474,516)	$0
47. Modify the technology acquisition process to include all computer manufactures and update departmental procedures to require participation by the director of Technology in all computer purchases	$0	$0	$0	$0	$0	$0	$0
48. Recruit and provide stipends to campus-based technology specialists.	$0	($10,000)	($20,000)	($26,000)	($32,000)	($88,000)	$0
49. Evaluate the network architecture to eliminate single points of failure.	$0	$0	$0	$0	$0	$0	$0
50. Modify the maintenance contract to eliminate maintenance of obsolete or low-value items.	$40,650	$40,650	$40,650	$40,650	$40,650	$203,250	$0
51. Purchase and implement a software package to monitor and track help desk activities.	$0	$0	$0	$0	$0	$0	($995)
52. Provide local application support and training on the business and student mainframe computer systems.	($5,000)	($10,000)	($15,000)	($15,000)	($15,000)	($60,000)	$0
53. Include representatives from administrative areas on the technology committee.	$0	$0	$0	$0	$0	$0	$0
54. Modify the long-range technology plan to include detailed action plans with annual budget amounts.	$0	$0	$0	$0	$0	$0	$0
55. Develop a comprehensive disaster recovery plan.	$0	$0	$0	$0	$0	$0	$0
Chapter 6 Total	($17,074)	($84,798)	($99,798)	($105,798)	($111,798)	($419,266)	($995)

CHAPTER 7
HUMAN RESOURCES MANAGEMENT

The Human Resources (HR) Department is headed by an executive director for Human Resources and Student Services and consists of a director of Personnel Services and five administrative staff. Departmental duties include responsibility for recruiting efforts, oversight of the hiring process, certification confirmations, preparation of employment contracts, benefit selection processing, and maintenance of the personnel information database for Public Education Information Management System (PEIMS) submissions to the Texas Education Agency (TEA). HR Department staff work with staff in the Business Services Department to manage the district's compensation and benefits processes. The Human Resources Department also monitors absences to ensure federal and state regulations are properly applied.

ACCOMPLISHMENTS
▪ SSAISD uses comprehensive checklists to enhance the accuracy and consistency of personnel records and ensure all necessary information is gathered for compliance with federal, state, and local laws and regulations.

▪ The district uses and regularly updates a detailed and comprehensive reference manual including copies of all HR forms and checklists, departmental policies, and salary schedules to streamline HR processes, effectively disseminate procedural information, and assist managers in compliance with personnel laws and local procedures.

▪ The HR Department uses a mail-ready, color-coded reference card for job applicants including a liability release to increase potential responses and reduce administrative processing time and expenses.

FINDINGS
▪ The HR Department supervisory staff has too many responsibilities while the remaining staff lacks Human Resources technical skills and qualifications necessary to perform many standard personnel tasks.

▪ The board does not have a compensation approach that keeps salaries competitive, equitable, and within established market values.

▪ The district provides flat rate stipends to non-exempt employees for specified additional assignments, rather than pay based on the number of hours worked on the second job.

▪ The district does not use its payroll system to consistently track and manage compensatory time accrual and use.

▪ SSAISD does not routinely update job descriptions to ensure that they are consistent with the organizational structure, accurately reflect job duties, and define minimum qualifications for listed positions or have an accountability process to ensure task performance.

▪ The employee grievance policy does not require the board to resolve a complaint within a designated amount of time.

▪ The district is not in compliance with federal standards and its own policy regarding offers of conditional employment or have written procedures to address instances of required pre-employment medical testing in compliance with federal standards and district policy.

▪ SSAISD staff has not fully implemented the personnel management and reporting tools available in the personnel module of the district's business software system.

▪ The HR Department does not have a process to ensure that employee handbooks and required personnel-related notices are current and efficiently communicated to all employees.

▪ SSAISD does not provide a consistent orientation program to all employees.

▪ The HR Department does not routinely analyze collected departmental data.

RECOMMENDATIONS
▪ **Recommendation 56 (p. 110): Upgrade three clerical positions to technical positions requiring Human Resources education and experience and adjust administrative duties.** As staff retires, the district should convert three of its current clerical positions to positions requiring the education and skills to provide full strategic Human Resource services to the district in three areas: health and safety, compensation and classification, and employee relations. The district should use Texas Association of School Board (TASB) model job descriptions and job descriptions posted on Human Resource websites as reference materials for updating these job descriptions and should include proficiency in technology skills to match the district's move to increased technological functions.

- **Recommendation 57 (p. 112): Develop and implement a market-based compensation schedule and corresponding board policy.** The board voted to implement a portion of recommendations from a June 2004 TASB salary study; however, the district still should address employees paid below competitive market rates and those paid in excess of recommended maximums. Compensation schedules should reflect market pricing for all jobs, not just for selected categories of employees.

- **Recommendation 58 (p. 114): Adopt a policy of compensating non-exempt employees on the number of hours actually worked for extra jobs and reserve stipends for exempt positions.** In implementing the policy, HR Department staff should work with relevant non-exempt employees to develop an arrangement where extra duties are compensated with either compensatory time off or overtime. If compensatory time off is elected, the Human Resources Department should ensure that both the district and employee agree to the arrangement before any work is performed and that the arrangement is documented. If the district decides that a stipend is more cost-effective, the extra job should be assigned to an exempt employee.

- **Recommendation 59 (p. 116): Amend district policy and require departments to use the payroll system to track and manage compensatory hours.** The district should amend the compensatory policy outlined in the employee handbook to require use of the payroll system to track compensatory time. The executive director for Human Resources and Student Services should work with the executive director for Business and Finance Services to provide monthly reports for supervisors to monitor and track compensatory accruals and use to meet all regulatory requirements.

- **Recommendation 60 (p. 117): Update job descriptions and develop and implement a schedule for ongoing periodic review.** Positions should be reviewed to determine: job title; Fair Labor Standards Act (FLSA) classification; general description or purpose; qualifications; essential functions; other functions; equipment used on the job; working conditions; mental and physical demands; and environmental factors. The review should also determine if any positions have changed classification under new Department of Labor standards for classifying positions as exempt or non-exempt under FLSA that will go into effect

in August 2004. Job families should be reviewed on a rotating schedule, reviewing one job family each year.

- **Recommendation 61 (p. 118): Update the district grievance policies to require response by the board within a designated time.** The district policies should be revised to include language that selects a time for response. The time selected for response should be reasonable and allow the board to act on advice of legal counsel, while providing the employee with timely closure to the grievance. The executive director for Human Resources and Student Services should seek advice from district legal counsel and develop and submit a proposed revision to the grievance policy that balances both district and employee needs to the board for approval.

- **Recommendation 62 (p. 118): Document testing procedures and develop and use a written conditional offer of employment letter for positions that require pre-employment, medical or physical testing.** The executive director for Human Resources and Student Services should develop and distribute a conditional offer of employment letter for departments to use. Upon implementation, department heads should provide a copy of the conditional employment letter and testing results to the HR Department to document compliance with federal and state law.

- **Recommendation 63 (p. 119): Obtain additional training to use the full capabilities of the Human Resource and Payroll modules of existing system software.** The district's existing agreement with Regional Education Service Center XX (Region 20) includes access to the modules and training from regional staff at no additional cost. The executive director for Human Resources and Student Services should work with the executive director for Business and Finance Services to identify payroll and personnel system capabilities that the district wants to activate to efficiently capture, track, and provide personnel management information to the executive directors as well as administrators and department heads providing increased efficiencies.

- **Recommendation 64 (p. 120): Implement a review and update process for employee handbooks and required personnel-related postings, and distribute the information electronically and in hard copy.** The executive

director for Human Resources and Student Services should develop an annual schedule and assign HR Department staff to review all district work locations to ensure required notices are current and properly posted. The executive director for Human Resources and Student Services should also develop an annual review schedule for all employee handbooks and coordinate with HR Department staff and the Curriculum, Instruction, and Assessment Services Department to update all written employee handbooks as new policies are adopted or laws change. Current processes should increase district compliance with relevant laws and reduce misunderstandings by ensuring that policies are consistently communicated.

▪ **Recommendation 65 (p. 121): Develop and implement a consistent employee orientation program.** The executive director for Human Resources and Student Services should develop a standard presentation that can be easily delivered by any HR Department staff. The presentation should include personnel-related topics such as anti-discrimination or harassment as well as safety and purchasing policies. Incorporating topics such as these into a consistent orientation program could help the district reduce risks of non-compliance with law or district policy.

▪ **Recommendation 66 (p. 122): Develop processes to compile, analyze, and report management information and performance measures to managers and administrators.** The executive director for Human Resources and Student Services should survey district managers and administrators to determine the type of information or reports that would support decision-making efforts. The district should be able to use trend analysis in developing targeted recruitment and retention strategies as well as providing administrators with valuable information to address any issues that arise regarding employee absenteeism and leave.

DETAILED ACCOMPLISHMENTS
PERSONNEL RECORDS CHECKLISTS

To ensure that personnel records are complete and comply with federal, state, and local requirements, the HR Department developed a detailed, color-coded checklist for each category of employee—professional, non-certified, and substitute. The checklists include new employee forms; employment applications and support documentation such as resumes, transcripts, and certifications; payroll and benefits election forms; and contract information. Each checklist also summarizes the number of contract days and has an acknowledgement that employees sign indicating that they were made aware of required documentation for employment and applicable submission timeframes. **Exhibit 7–1** provides examples of some of the types of documentation required for all employees.

With the personnel folder checklists, HR Department staff consistently order and file the documentation in the folder. Staff can then quickly determine missing or incomplete information and prioritize those items for completion to comply with applicable laws and regulations.

EXHIBIT 7–1
EXAMPLES OF REQUIRED DOCUMENTATION FOR PERSONNEL RECORDS

STATUTE	DOCUMENTATION TO MEET REQUIREMENT
Immigration Laws	I-9 immigration form documenting legal work status, to be completed within three days of hire.
Internal Revenue Code	W-4 form documenting an individual's tax status for determining proper tax withholding.
Drug Free Workplace Act	Documentation showing adoption of a drug-free workplace policy that is provided to new employees with a signature page that acknowledges receipt.
Texas Government Code §573.002, 573.047 (Nepotism)	SSAISD Affidavit for Nepotism Agreement form completed by employees at time of hire documenting that the employee is not related to a board member within the third degree by blood or second degree by marriage.
Texas Education Code (TEC) §22.083	SSAISD Release of Criminal History Records Information form completed by applicant allowing district to perform criminal history check as authorized by TEC.
Texas Constitution	Oath of Office and Allegiance, documented at time of hire.
Texas Civil Statutes (4477–12, Section 5)	Proof of tuberculosis examination, documented on employee's first day of work.
Texas Government Code 551, 552	State of Texas New Hire Reporting Form including demographic data for collection and report to the Texas Education Agency for PEIMS. Form includes a collection disclaimer that protects the district from violation of federal law and notifies employee that personnel information gathered on the form is public information, unless the employee specifically restricts the information from release.

SOURCE: SSAISD, Human Resources Department, May 2004.

HUMAN RESOURCES FORMS REFERENCE BOOK

In response to increasing calls for assistance with HR procedures, the executive director for Human Resources and Student Services and the HR Department staff created and disseminated a reference book of forms and checklists to assist managers in complying with personnel laws and district procedures. Besides forms, the book also includes selected personnel policies and salary schedules. In interviews, administrators said the reference book was very helpful. The compilation saves supervisory time in determining the proper forms for a wide range of personnel activities and includes the following:

- General contact information;

- School roster forms;

- Class size ratio report forms;

- Exit interview forms;

- Leave forms;

- Mentor assignment forms;

- Supplemental pay forms;

- Parent volunteer applications;

- Staffing needs requests;

- Transfer request forms;

- Evaluation forms;

- Principal appraisal goal setting forms;

- Employee progressive discipline forms; and

- Interview forms.

In updating the book, SSAISD has legal counsel review any form that is potentially affected by a legal requirement before it is adopted by the board for use. HR Department staff also periodically review forms for content and effectiveness and incorporate changes suggested by users to improve a form's readability.

REFERENCE REQUEST CARDS

The HR Department uses a mail-ready, color-coded job applicant reference card including a liability release to increase responses and reduce administrative processing time and expenses. Prior to 2002, the district used to include reference forms to prospective applicant references with the standard application as part of the application process. In 2002, the district re-designed the form from a piece of letter-sized paper that required the recipient to return it in an envelope to a foldable card that creates an envelope and can be directly mailed. The

applicant completes the top section of the card and returns the card and application to the district. After verifying and documenting that the applicant completed the top portion of the card, HR Department staff mail the card to the applicant's reference for completion. The person identified as the reference then simply completes the remaining portion of the card, folds it into the envelope shape and mails it, as is, back to the district for processing.

The reference card also includes language that releases the reference from liability for providing the reference. The applicant signs the release, and waives any concerns the reference might have about the confidentiality of the information requested.

The cards are color coded—blue for professional applications, yellow for auxiliary/support services, and cream for substitutes. With color-coded cards, the district eliminates the need for envelopes, and HR Department staff can easily identify and locate the appropriate type of application file upon receipt of a card. Use of these cards also simplifies staff processing and follow-up time, since the district only calls applicants that do not return the reference cards with their applications.

DETAILED FINDINGS

DEPARTMENT STAFFING (REC. 56)

The HR Department supervisory staff has too many responsibilities, while the remaining staff is administrative and non-degreed in HR affecting their ability to perform many standard personnel tasks. The HR Department has two supervisory staff with master's degrees and five, non-degreed clerical positions to serve the district's 1,369 full-time equivalent (FTE) employees. The executive director of Human Resources and Student Services, however, serves two functional areas reducing the HR Department full-time equivalents to six and one-half for a total HR staff to employee ratio of 1:211. By comparison, the human resources industry standard is 1:100. In addition, none of the clerical staff have human resources degrees or qualifications, and they are primarily engaged in paper management tasks such as file maintenance, data entry, and information collection and confirmation (**Exhibit 7–2**).

Staff do not perform standard personnel tasks such as routine job audits to update job descriptions and determine if jobs remain under the correct federal labor law classifications. Staff also do not perform regularly scheduled compensation studies or develop and implement procedures to actively track and manage Workers' Compensation or family medical leave to ensure compliance with laws and regulations. HR Department staff involvement in Workers' Compensation and family medical leave monitoring is primarily documentation-related.

The HR Department does hold annual meetings with clerks and secretaries responsible for providing employee documentation as it relates to absences—both extended leave such as that covered by the Family Medical Leave Act (FMLA) and short leave periods. Clerks and their supervisors receive training

statistical or other reports. Often a generalist also analyzes the consequences of policy changes and makes related recommendations, drafts and implements approved policies and procedures, and monitors activities for compliance with state and federal law and regulations. The state of Texas hires

EXHIBIT 7–2
SSAISD HUMAN RESOURCES DEPARTMENT STAFF ASSIGNMENTS
2003–04

POSITION	DUTIES
executive director for Human Resources and Student Services	Recruits applicants, performs cost analysis for salary adjustments, develops special programs, monitors legal compliance, oversees grievance process, conducts training, performs employee evaluations, administers employee contracts and conducts training for supervisors.
director of Personnel Services	Assists with recruitment and training, screens applicants, schedules interviews, works with site-based hiring committees, and performs Professional Development Appraisal System (PDAS) training, and other supervisory training.
Certification officer	Mails out, receives and files completed appraisals, prepares support for board agendas, monitors certifications and degrees to meet highly qualified requirements of No Child Left Behind, and monitors employee certifications.
PEIMS clerk	Monitors budget expenditures, updates position management spreadsheets, performs compensation calculations, and prepares employee contracts and appraisals.
Human Resources clerk	Enters data on professional staff into database, handles tuition reimbursements, and confirms employment for various agencies.
director's secretary	General secretarial support for department management.
Human Resources secretary	General secretarial support. Works with substitute locator (auto-dialer) system, and maintains the grievance files.

SOURCES: SSAISD, executive director for Human Resources and Student Services, and select job descriptions, May 2004.

in FMLA form use and the notification procedure for employee absences Trained clerks and their supervisors are told to alert staff from the HR and Payroll departments of an employee absence that exceeds three consecutive days, and they also receive FMLA forms for their employees. The FMLA form has a line item that addresses whether the employee has met with a representative from the HR Department before taking leave. Workers' Compensation is handled by the Business Services Department and the HR Department is provided a copy of the accident report, Texas Workers' Compensation Commission (TWCC) reports, and any doctors' notes provided.

Some school districts manage higher staff to employee ratios than industry standards with the use of technology and processes performed by staff with Human Resources qualifications and skills. To perform many of these standard personnel tasks, HR departments hire employees with college degrees in HR or a related field that are either generalists, or specialists in a focused area such as compensation and benefits or employee relations. Human Resource generalists independently perform more complex, analytical tasks such as: collecting and preparing compensation information, conducting position classification audits, reviewing and revising job descriptions based on job analysis, collecting and analyzing human resource data, and producing

Human Resources staff with the skills and knowledge to analyze, report, recommend, and implement a variety of strategies that are legally compliant, strategically effective, and fiscally responsible.

The district should upgrade and adjust duties for three clerical positions to positions requiring HR education and experience. The executive director for Human Resources and Student Services said that as of June 2004, there are two clerical staff vacancies. In addition, a third individual in the clerical staff currently meets eligibility requirements for retirement, while another is completing a lateral transfer to another open clerical position within the district. This fiscal impact accounts for the two vacated and budgeted positions and the remaining secretarial staff position vacated by the lateral transfer. The district should replace the transferred position vacancy with a Human Resource specialist at no additional cost, since the entry-level salary for an experienced Human Resource specialist for the state of Texas is $32,988 and both filled-secretarial positions in the Human Resources Department exceed $32,988.

The salaries for the two vacated positions are $44,321 and $39,901 for a combined total salary of $84,222. Fringe benefits of 10.4 percent equal $8,759

($84,222 x .104 = $8,759) for a total cost of $92,981 ($84,222 + $8,759 = $92,981).

This fiscal impact assumes the district will hire two specialists based on the entry-level state salary of $32,988. The total cost of the new positions, including fringe benefits is $72,838 [($32,988 salary x 2 positions = $65,976) x 1.104 fringe benefits = $6,862] resulting in an annual savings of $20,143 beginning 2005–06 ($92,981 – $72,838 = $20,143). First year savings are pro-rated for one-half a year to $10,072 ($20,143 / 2 = $10,072) for combined five-year savings of $90,644.

COMPENSATION APPROACH (REC. 57)

SSAISD's board has not adopted a compensation approach based on a market-based pay scale to keep salaries competitive, equitable, and within market values. Rather than apply an appropriate percentage cost of living adjustment to the pay scale, which keeps the scale closer to market, SSAISD's board has historically applied cost of living percentage increases to individual employee salaries. With this practice, employees move farther along the pay scale over time. Because the scale does not move, new employees placed on the scale do not benefit from the cost of living adjustment and senior employees' salaries have moved beyond the maximum salary range of the pay scale, because the district does not cap an employee's salary at the top of a range, or "redline" the employee.

The board also increases salaries for a specific type of position without adjusting the pay scale, if the district has trouble hiring or keeping employees in that position. In 1998, the board adopted a compensation package for certified trades personnel

such as mechanics and plumbers in response to vacancy rates in those job families. In 2001–02, bus drivers received a 23 percent increase from the entry point of their salary range to the midpoint and pay grade one custodians and food service workers received a 7.5 percent average, or an additional 50 cents per hour, as a recruitment and retention tool.

The district also does not routinely review compensation schedules to determine if pay among similar internal positions is equitable. For example, two department level secretaries that perform similar duties and are classified at pay grades three and four earn more than executive level secretaries classified at pay grades five and six.

As a result of these practices, the district pay scale is no longer a valid reference point for determining the market competitiveness of a position. In August 2003, the HR Department completed a salary survey comparing SSAISD professional, clerical, and manual/trades position maximum salaries with nine San Antonio-area school districts to determine the competitiveness of SSAISD's salaries. The districts participating in the survey included: North East, San Antonio, North Side, Alamo Heights, East Central, Judson, Southwest, Harlandale, and Edgewood. The survey, based on the average of actual salary maximums, did not reflect whether or not the district's pay scale was at market value. SSAISD engaged TASB to perform a compensation study and particularly look at individual job families in comparison to the area market. TASB completed the study with findings in July 2004.

Exhibit 7–3 presents data from the *Texas Association of School Boards, South San Antonio ISD Salary Study and Compensation Plan, July 2004* for administrator salaries.

EXHIBIT 7–3
SSAISD SALARY COMPARISON
ADMINISTRATOR POSITIONS
2004

| | | | | AMOUNT DISTRICT ANNUAL SALARY IS ABOVE/(BELOW) | |
POSITION	TASB ANNUAL MARKET SALARY	SSAISD PAY SCALE MAXIMUM SALARY	DISTRICT ANNUAL SALARY	TASB ANNUAL MARKET SURVEY	SSAISD PAY SCALE MAXIMUM
Chief Financial Officer	$95,457	$76,243	$74,584	($20,873)	($1,659)
Chief Human Resources Officer	$78,744	$76,243	$81,688	$2,944	$5,445
Chief Operations Officer	$90,106	$76,243	$81,754	($8,352)	$5,511
Chief Instruction/ Curriculum Officer	$86,846	$81,581	$86,113	($733)	$4,532
Director, Instruction/ Curriculum	$81,632	$71,256	$78,175	($3,457)	$6,919
High School Principal	$85,591	$68,287	$75,128	($10,463)	$6,841
Middle School Principal	$73,846	$64,130	$73,545	($301)	$9,415
Elementary Principal	$70,123	$59,652	$60,557	($9,566)	$905
High School Assistant Principal	$61,463	$58,265	$55,717	($5,746)	($2,548)
Middle School Assistant Principal	$58,018	$57,432	$60,017	$1,999	$2,585
Elementary Assistant Principal	$57,192	$51,343	$54,582	($2,610)	$3,239
Average Teacher Salary (all teachers) - Median	$41,428	$40,368	$40,619	($809)	$251

SOURCES: *Texas Association of School Boards, South San Antonio ISD Salary Study and Compensation Plan, July 2004 and SSAISD Human Resources Department.*

It compares SSAISD's annual salaries and pay scale maximum salaries for administrators to the TASB market annual salary, based on statewide data collected and published in TASB's *Salaries and Benefits in Texas Public Schools 2003–2004*, *Administrative/ Professional Report*. The TASB market annual salary compares districts with enrollments of 10,000– 24,999 students. As shown in **Exhibit 7–3**, SSAISD's pay scale maximum salaries lag behind the TASB market salary in almost all administrator positions, demonstrating that the district's pay scale is not market competitive for most positions. It also shows that the district's actual annual salaries lag behind those of the San Antonio market for most administrator salaries.

Exhibits 7–4 and 7–5 present data from the *Texas Association of School Boards, South San Antonio ISD Salary Study and Compensation Plan, July 2004* for clerical and manual/trades staff salaries. It compares SSAISD's average salaries and pay scale maximum salaries for clerical and manual/trades to the TASB market annual salary, based on statewide data collected and published in TASB's *Salaries and Benefits in Texas Public Schools 2003–2004*, *Auxiliary Report*. The district chose to report its figures in the TASB average salary comparison category for districts with enrollments of 10,000–24,999 students. Unlike administrator salaries, **Exhibit 7–4** shows that SSAISD salaries compare favorably to TASB annual market salaries in all clerical categories except middle school secretary. This reflects the cost of living increases that have accumulated for senior employees over a number of years as well as lack of redlining. Similar to the administrator pay scale, SSAISD's clerical pay scale is not market competitive for most positions; SSAISD actual average salaries for all but one of the clerical positions surveyed were above the maximum salary of the pay scale and the maximum pay scale salary for all but one position was below the TASB annual market salaries.

Similar to clerical salaries, **Exhibit 7–5** shows that average SSAISD hourly rates for most manual/trades positions compare favorably to TASB hourly market rates. The hourly rate is used for comparability in these job categories because the number of hours per day and number of days per year varies from district to district.

As shown in **Exhibit 7–5**, the maintenance-related positions are substantially over market. Five positions, bus driver, food service worker, custodian, vehicle mechanic and police officer, are under market. The average SSAISD hourly rate is above the pay scale maximum for nine of the thirteen positions surveyed and reflects accumulated cost of living increases for senior employees over a number of years, a lack of redlining, and adjustments to salaries approved by the board that were not market-driven.

Based on the comparisons, TASB developed findings and recommendations to address issues with SSAISD's compensation system. **Exhibit 7–6** summarizes TASB's findings and recommendations.

There are generally four types of pay increases that many districts consider when developing a compensation approach or philosophy. The compensation structures sometimes change to reflect the current low, mid, and high points of the market. Districts may equally implement a flat increase for all employees to adjust for changes in the cost of living. A time-based increase many times rewards employees for length of service. Districts sometimes use merit or performance pay raises for deserving employees meeting expressed standards.

A clear compensation philosophy guides salary decisions, communicates the circumstances that affect salary increases, ensures consistent application of compensation programs, and reduces the risk of sentiment-based decisions. By articulating guidelines, organizations place fiscal controls on compensation practices. For example, Spring Independent School District redlines employee base pay, but provides

EXHIBIT 7–4
SSAISD SALARY COMPARISON
PRIMARY CLERICAL POSITIONS
2004

POSITION	TASB ANNUAL MARKET SALARY	SSAISD PAY SCALE MAXIMUM SALARY	DISTRICT AVERAGE SALARY	AMOUNT DISTRICT AVERAGE SALARY IS ABOVE/(BELOW)	
				TASB ANNUAL MARKET SURVEY	SSAISD PAY SCALE MAXIMUM
Superintendent's Secretary	$32,219	$30,881	$42,899	$10,680	$12,018
Director's/Department Manager's Secretary	$24,629	$27,821	$31,123	$6,494	$3,302
Principal's Secretary - High School	$27,938	$23,601	$29,726	$1,788	$6,125
Principal's Secretary - Middle School	$24,154	$21,617	$20,907	($3,247)	($710)
Principal's Secretary - Elementary School	$23,179	$21,617	$23,921	$742	$2,304
Classroom Teacher Aide	$15,119	$13,974	$14,653	($466)	$679

SOURCES: Texas Association of School Boards, South San Antonio ISD Salary Study and Compensation Plan, July 2004 and SSAISD Human Resources Department.

EXHIBIT 7–5
SSAISD SALARY COMPARISON
MANUAL/TRADES POSITIONS
2004

| | | | | AMOUNT AVERAGE SSAISD HOURLY RATE IS ABOVE/(BELOW) | |
POSITION	TASB HOURLY MARKET RATE	SSAISD PAY SCALE HOURLY MAXIMUM RATE	AVERAGE SSAISD HOURLY RATE	TASB MARKET RATE	SSAISD PAY SCALE MAXIMUM
Bus Driver	$11.30	$12.70	$10.79	($0.51)	($1.91)
Cafeteria Manager Elementary School	$12.22	$12.92	$13.40	$1.18	$0.48
Cafeteria Manager High School	$14.45	$12.92	$14.45	$0.00	$1.53
Food Service Worker	$8.83	$8.46	$7.51	($1.32)	($0.95)
Lead Custodian	$11.61	$11.20	$12.29	$0.68	$1.09
Custodian	$8.76	$8.46	$7.59	($1.17)	($0.87)
Maintenance Foreman	$19.59	$19.39	$27.48	$7.89	$8.09
General Maintenance Worker	$9.48	$10.70	$12.61	$3.13	$1.91
HVAC Mechanic	$16.57	$16.72	$20.42	$3.85	$3.70
Electrician	$16.91	$19.58	$22.48	$5.57	$2.90
Plumber	$16.03	$18.08	$18.59	$2.56	$0.51
Vehicle Mechanic	$15.11	$12.42	$14.42	($0.69)	$2.00
Police Officer	$16.84	$14.80	$13.05	($3.79)	($1.75)
Groundskeeper	$10.25	$9.23	$12.82	$2.57	$3.59
Bus Monitor	$8.89	$7.96	$7.20	($1.69)	($0.76)
Warehouse Assistant	$12.25	$10.70	$9.15	($3.10)	($1.55)

SOURCES: Texas Association of School Boards, South San Antonio ISD Salary Study and Compensation Plan, July 2004 and SSAISD Human Resources Department.
NOTE: Computer technician is not represented because it is not classified as a manual/trades position by SSAISD.

other performance incentives for employees at the top of the scale. The state of Texas performs periodic compensation studies and builds its compensation program around market value and the skill and experience level of a competent employee.

In administering market-based pay compensation programs, salary data comparisons must be current. To achieve this, some districts rotate compensation reviews on a scheduled basis. For example, a district that has three categories of employees schedules one categorical review each year. Under that particular rotation, job families stay within three years of current market rates.

The board voted to implement a portion of recommendations from a June 2004 Texas Association of School Boards (TASB) salary study; however, the district still must address employees paid below competitive market rates and those paid in excess of recommended maximums.

The district should develop and implement a market-based compensation schedule and corresponding board policy. Compensation schedules should reflect market pricing for all jobs, not just for selected categories of employees. A related policy should require periodic market review to ensure schedules remain current. As the district hires new employees or gives salary increases, the executive director for Human Resources and Student Services should ensure salaries are equitable in similar positions districtwide. The board should also adopt a policy that eliminates salary increases for employees who are compensated beyond the maximum of the pay

scale. Once the district salary schedules are brought to market, employees who are above maximum should be redlined until the market catches up with the pay. Any recommendations for pay increases should identify redlined employees.

STIPEND POLICY (REC. 58)
The district provides flat rate stipends to non-exempt employees for specified assignments, rather than pay based on the number of hours worked on a second job. SSAISD provided a stipend to at least one non-exempt position in 2003–04. The federal Fair Labor Standards Act (FLSA) sets minimum standards for calculating employee pay including overtime provisions for non-exempt employees while professional staff is generally classified as exempt from the FLSA overtime provisions. With some exceptions, FLSA requires that a non-exempt employee receive overtime pay at a premium rate of an hour and a half earned for each hour worked, for the number of hours worked weekly in excess of forty. FLSA also allows an employee compensatory time off in lieu of overtime pay; however, both the employee and the employer must agree to the terms before the work is performed and compensatory time off is earned at the same rate as overtime pay.

School districts traditionally compensate additional jobs, such as sponsoring an after school club or coaching an extra-curricular sport, by paying a set fee, or stipend rather than compensating for extra hours worked. For example, SSAISD pays a stipend to the position that is responsible for scheduling and coordinating community use of the fine arts

EXHIBIT 7–6
TASB SALARY STUDY
SUMMARY OF FINDINGS AND RECOMMENDATIONS
JULY 2004

JOB FAMILY	FINDINGS	RECOMMENDATIONS
Teachers	1. District pay schedule is competitive except at years zero and fifteen. 2. District pays between $260 and $6,606 in stipends for master's degree. There are no data to support such a large difference in pay.	1. Increase hiring salary to at least $34,500. 2. Provide each teacher with $1,300 pay increase and increase schedule at each step by this amount. 3. Increase the hiring schedule to the recommended step for years one through 12. Pay equity adjustments to any teacher, registered nurse, or librarian whose pay is below recommended step. 4. Pay a $1,500 stipend to teachers with a master's degree, regardless of years of experience. Increase stipends for those earning less than $1,500 and "grandfather" stipends paid that are more than $1,500.
Administrators and Professionals	1. District has eight pay grades. The structure has not been adjusted in many years resulting in employees paid well outside the structure. Recruiting is difficult due to the inability to offer competitive salaries. 2. Administrators are paid overall 6 percent below median salaries of comparison districts. 3. Professionals are paid 11percent above median salaries of the comparison districts. 4. Counselors and diagnosticians are paid on teacher schedule, resulting in low starting salaries. Replacing this group will be difficult unless pay scale is higher than teachers.	1. Create eight market-based, progressive pay grades. Provide increases based on percentage of midpoint. A 3 percent increase is recommended. 2. Do not provide increases to those whose pay is above the recommended maximum. 3. Move counselors, speech pathologists, occupational therapist, and diagnosticians off of teacher pay schedule to a market competitive pay range. 4. Move the police chief from manual trades' pay structure to this structure, providing a market competitive range for this position.
Clerical/ Paraprofessional	1. Clerical/paraprofessionals paid on 14 ranges with some ranges unused. Appears that pay ranges have been created over the years to accommodate market influences since older structures were never adjusted. 2. Stuctures have not been adjusted in years and most employees' pay is outside the range. Structures have very low starting salaries and are unusable. 3. District matched 24 market benchmarks.	1. Create seven market-based, progressive pay grades. Provide increases based on percentage of midpoint. A 3 percent increase is recommended. 2. Provide equity increases to employees, whose pay is below recommended pay grade minimum, increasing their pay to 1.5 percent above minimum. 3. Do not provide increases to those whose pay is above the recommended maximum.
Manual Trades Employees	1. Manual trades employees are paid on 15 ranges. Appears that pay ranges have been created over the years to accommodate market influences since older structures were never adjusted. 2. Manual trades jobs are overall 4 percent above market median. Most notably, maintenance foreman, electricians, and general maintenance workers are more than 30 percent above the median. 3. Several high occupancy jobs including custodians, bus drivers, police officers, and food service workers are well below the market.	1. Create eight market-based, progressive pay grades. Provide increases based on percentage of midpoint. A 3 percent increase is recommended. 2. Provide equity increases to employees, whose pay is below recommended pay grade minimum, increasing their pay to 1.5 percent above minimum. 3. Do not provide increases to those whose pay is above the recommended maximum.

SOURCE: Texas Association of School Boards, South San Antonio ISD Salary Study and Compensation Plan, July 2004.

auditorium. The duties originally were assigned to a central staff position, but were transferred to a school staff position. By using stipends, districts can transfer the compensation if the additional duties are transferred from one exempt position to another.

The United States Department of Labor issues opinions to guide employers in determining if a second job or assignment would be considered the same as the primary assignment, or if it would be a new and different assignment. Despite the guidelines, the determination is not always an easy one to make and an incorrect determination can result in financial penalties.

Many school districts are developing policies that limit the use of stipend-based assignments for non-exempt employees. In 2004, the Austin Independent School District changed its policy and in 2004–05 does not allow non-exempt employees to perform assignments paid by stipend.

The executive director of Human Resources and Student Services should review available guidelines and compensation policies such as those found on the United States Government website or through Austin Independent School District and draft a policy to compensate non-exempt employees for number of extra hours worked and reserve stipends for exempt employees. The superintendent should then review and approve the drafted policy before presentation to and adoption by the board. In implementing the policy, HR Department staff should work with relevant non-exempt employees to develop an arrangement where extra duties are compensated with either compensatory time off or overtime. If compensatory time off is elected, the Human Resources Department should ensure that both the district and employee agree to the arrangement before any work is performed and that the arrangement is documented. If the district decides that a stipend is more cost-effective, the extra job should be assigned to an exempt employee.

HR Department staff should work with any relevant non-exempt employees to develop an arrangement whereby extra duties are compensated with either compensatory time off or overtime, depending on which is the more cost effective. If compensatory time off is elected, the Human Resources Department should ensure that both the district and employee agree to the arrangement before any work is performed and that the arrangement is documented. If the district decides that a stipend is more cost-effective, the extra job should be assigned to an exempt employee.

COMPENSATORY TIME TRACKING (REC. 59)

The district does not use its payroll system to consistently track and manage compensatory time accrual and use. SSAISD closely monitors overtime accrual and use but does not employ the same methods for compensatory time. If a supervisor determines that overtime is needed, a memorandum must be sent to The HR Department. The HR Department obtains approval from the superintendent and sends it to the Business and Finance Services Department. Overtime pay is processed as part of the regular payroll process.

SSAISD's Maintenance Department routinely uses compensatory time in lieu of overtime pay. Instead of noting compensatory time accrued or used on

timesheets that will be entered into the payroll system, Maintenance Department clerks track compensatory time on index cards that occasionally bear a written notation such as, "IOU one hour," or "You owe me one hour." A review of the index cards indicates the compensatory time rate is correctly calculated, but not always precise.

In addition, the district does not have a policy that places limits on the amount of compensatory time accrued, although the FLSA generally limits accruals to 240 hours. The district also does not require departments to use the payroll system to monitor compensatory time. SSAISD's compensatory time policy outlined in the manual trades/clerical employee handbook states:

"Supervisors of non-exempt employees shall ensure an agreement or understanding with the employees regarding the form of compensation for overtime—cash or compensatory time off—prior to the performance of the work occasioning the overtime duty. These agreements or understanding need not be in writing, but the supervisor shall maintain some record of them such as a calendar notation, a memo to file, or some similar indication that the employee was notified of the type of compensation to expect."

Although there is a compensatory time-off policy, several administrators said in interviews that they are not authorized to use it. They will, however, allow employees who work a little late the latitude of taking an hour off at a later time. This flexible arrangement is not documented the way regular work hours are documented.

To easily monitor and ensure compliance with FLSA, many districts use their payroll system to correctly account for compensatory time accrual and use. The payroll module of the iTCCS, SSAISD's financial system provided through Region 20, has the ability to calculate the number of hours worked in a week to determine if overtime pay or compensatory time off is earned. Region 20 representatives said that most districts using the iTCCS payroll module track compensatory time as it is earned and used. Some districts also assign separate payroll codes to distinguish and monitor overtime pay and compensatory time off.

The district should amend the compensatory policy outlined in the employee handbook to require use of the payroll system to track compensatory time without amending district requirements for advance approval of overtime. In addition, the district should modify the overtime approval form to include compensatory time as an acceptable alternative and as documentation. Compensatory time should be reported on time sheets as hours worked, and the

payroll system will calculate the number of hours worked per week to determine if overtime pay or compensatory time off is earned. The district should adopt a payroll code that distinguishes between overtime pay and compensatory time off. Supervisors would then code the timesheet according to the type of compensation accrued; alerting the Payroll Department to make sure the payroll system awards the right type of compensation. The executive director for Human Resources and Student Services should work with the executive director for Business and Finance Services to provide monthly reports for supervisors to monitor and track compensatory accruals and use to meet all regulatory requirements.

JOB DESCRIPTIONS (REC. 60)

SSAISD does not routinely update job descriptions to ensure that they are consistent with the organizational structure, accurately reflect job duties, and define the minimum qualifications for the position. The review team examined a sample of job descriptions, which were in a variety of formats. At least one job description was blank, having no duties, qualifications, or other requirements. Other job

descriptions did not adequately define job qualifications and essential and non-essential functions as recommended supporting Americans With Disabilities Act (ADA) compliance. Some job descriptions reviewed have not been updated since 1990. **Exhibit 7–7** identifies issues found with the sample reviewed.

Although state law designates the superintendent as responsible for determining job duties and qualifications, the HR Department is usually assigned the task of documenting job duties and qualifications. In interviews, HR Department staff said job descriptions were adopted from TASB position descriptions. TASB reviewed the district's job descriptions as part of a large compensation and classification study.

Up-to-date, accurate job descriptions play a role in resolving any dispute over district expectations for performance. Organizations often ensure job descriptions are accurate to mitigate unclear performance expectations that may lead to disputes during performance reviews. In addition, job descriptions can serve as documentation for

EXHIBIT 7–7
REVIEW OF SSAISD JOB DESCRIPTIONS BY POSITION TITLES

ISSUE	POSITION TITLE AFFECTED
Inconsistent title with organization chart or position is not included on organization chart.	associate superintendent Instructional Services coordinator of Adult Education Program director of Gifted and Talented Education director of Elementary Education director of Secondary Education secretary, Personnel Department reports to the director of Personnel Services who answers to an executive director for Human Resources and Student Services
No job description	administrator, K–12 administrator for Bilingual/ESL Program director of Accelerated Instruction coordinator for Nurses Services consultant for Accelerated Instruction
Job description not dated	director of Student Assessment; director, Career and Technology Education; principal; USP Campus coach; Vertical Team leader; Teacher specialist, Reading
Job description outdated	director, Reading/Language Arts (last revised January 1999); director of Instructional Technology (last revised August 1986); Program director of Title I Regular/Migrant (last revised August 1996); supervisor (Title I) (last revised September 1999); Special Education supervisor (last revised August 1987)
Position title does not match job responsibilities.	Patrol sergeant, clerk II, Security Patrol officer (positions actually perform dispatch duties)
Handwritten change with no initialing of number of work days associated with position	porter, custodian – Day or Night
Two job descriptions for same position	director of Personnel Services/executive director for Personnel Services; Secretary, Personnel director/secretary, Personnel Department
Description of purpose, qualifications, responsibilities, and working conditions were blank	Office clerk
Questionable FLSA classification	General accountant classified as non–exempt

SOURCE: SSAISD, Human Resources Department and district staff interviews, May 2004.

compliance with laws such as the ADA and Equal Employment Opportunity Act. The ADA for example, requires employers to treat an individual with a disability as any other employee, if the disabled employee can perform the essential functions of the position with reasonable accommodation. A well-written job description documents the essential functions and the minimum qualifications needed to perform them.

The Equal Employment Opportunity Commission considers whether or not a written job description was prepared before a position was advertised or applicants interviewed as evidence of whether or not a particular function of the position is considered essential. While most job descriptions do not convey all possible tasks, most provide employees with a reasonable understanding of a position's requirements and an organization's expectations for performance.

The state of Texas provides online tools for its departments to assist them in reviewing positions and updating job descriptions. Often, organizations use surveys and staff interviews to determine if job descriptions match current job duties performed and to ensure positions are appropriately staffed. Many districts use job description templates such as those provided by TASB, to ensure that each description is consistent, personalized, and contains key elements such as minimum qualifications and descriptions of essential functions.

SSAISD should review job descriptions to determine: job title; Fair Labor Standards Act (FLSA) classification; general description or purpose; qualifications; essential functions; other functions; equipment used on the job; working conditions; mental and physical demands; and environmental factors. The review should also determine if any positions have changed classification under new Department of Labor standards for classifying positions as exempt or non-exempt under FLSA that will go into effect in August 2004.

To identify employee roles, responsibilities and job duties, the executive director for Human Resources and Student Services should develop and distribute a job analysis questionnaire to all employees. Human Resources Department staff can then compile the questionnaire results into draft job descriptions and distribute the drafts to supervisors and employees for review and proposed corrections. The executive director for Human Resources and Student Services should review and obtain clarifications for any proposed corrections before descriptions are finalized. The HR Department staff should then finalize the drafts into a package for superintendent review and board approval. Once approved, the date

of approval should be added to the job description. In implementing ongoing review and update, the Human Resources Department should review job descriptions when there is turnover in positions or when there is a reorganization or reduction of staff. Job families should be reviewed on a rotating schedule, reviewing one job family each year.

GRIEVANCE POLICY AND PROCEDURES (REC. 61)

The employee grievance policy does not require the board to resolve a complaint within a designated amount of time. Texas case law has provided certain grievance procedure guidance that SSAISD's board has adopted as policy. For example, employees may present a grievance regarding an appraisal, and the board provides a written response. The board is also required to provide employees an opportunity at its regular meeting to present complaints for consideration.

SSAISD's general grievance process for employee complaints has three levels (**Exhibit 7–8**), one of which requires action within a specified time period. A Level Three grievance, which involves the employee appealing to the board to hear and resolve the grievance, does not have a specific timetable for resolution.

As shown in **Exhibit 7–7**, the grievance process does not require the board to resolve the issue and the policy does not define the point at which an employee knows the board is not going to respond. The review team confirmed that at least one complaint has remained unresolved since 2001–02, having been tabled by the board. Without a specified timetable for response, grievances can be tabled with no resolution and no method for the employee to gain final resolution. This affects employee relations and employee morale.

The district policies should be revised to include language that selects a time for response. The time selected for response should be reasonable and allow the board to act on advice of legal counsel, while providing the employee with timely closure to the grievance. The executive director for Human Resources and Student Services should seek advice from district legal counsel and develop and submit a proposed revision to the grievance policy that balances both district and employee needs to the board for approval.

PRE-EMPLOYMENT TESTING AND CONDITIONAL OFFERS OF EMPLOYMENT (REC. 62)

The district does not have written testing procedures or conditional offers of employment for positions requiring pre-employment medical testing to

EXHIBIT 7–8
SSAISD GRIEVANCE PROCESS

GRIEVANCE LEVEL	PROCEDURE	TIME TABLES FOR RESPONSE
Level One	Employee requests conference to resolve written grievance with the principal or immediate supervisor.	Principal or supervisor shall hold conference within seven working days of receipt of request. Principal or supervisor has seven days following the conference to respond.
Level Two	Employee who is not satisfied with Level One outcome or who has not received a written response within specified time frame, files written request for conference with superintendent or designee.	Superintendent or designee shall hold conference within seven working days of receipt of request. Superintendent or designee has seven working days following the conference to respond.
Level Three	Employee who is not satisfied with Level Two outcome or who has not received a written response within specified time frame, files written request to place matter on the agenda of a future board meeting.	Employee files written request with superintendent within seven working days following receipt of Level Two response or within seven working days of deadline for Level Two response if no response received. Board shall consider the grievance, but the board is not required to respond or take any action on the matter.

SOURCE: SSAISD, Elementary Teacher Handbook, May 2004.

document compliance with federal standards and district policy. To comply with state law, the Transportation and the Police Departments require applicants for certain positions to undergo medical testing as part of the hiring process. Before the district hires bus drivers, they must pass drug and medical tests to determine driver fitness and must periodically participate in drug testing to hold a commercial driver's license. Similarly, police officers candidates must pass drug and psychological tests before becoming an officer and must successfully complete the district's physical agility test, a 15-minute mile walk, prior to hiring.

In hiring bus driver and police officers, the HR Department receives applications, screens the applicants, and performs criminal background checks. If the background check is clear, the Human Resources Department sends the application to the respective department and department staff interviews the applicant. During interviews, prospective employees are informed that employment is conditioned upon successfully passing the required tests. The respective departments then work directly with applicants during the testing part of the hiring process. For bus driver drug testing, the district contracts with Region 20. The HR Department does not monitor or participate in the testing process to ensure compliance.

The district policy on pre-employment medical testing requires a conditional offer of employment prior to the test, and the results of the test prior to beginning employment duties. In practice, the process of communicating the testing requirements is verbal. The district also does not provide applicants with a written offer of employment and there are no written agreements that document conditional employment.

All phases of the hiring process are affected by federal and state regulation. Documentation is one of the best methods for proving compliance. Many government human resource agencies develop testing procedures and forms such as conditional letters of employment for supervisors to use to ensure compliance. These agencies also use the Internet to effectively communicate their pre-employment testing requirements and conditional employment policies for prospective employees to review.

The executive director for Human Resources and Student Services should document existing testing procedures that explain the district's hiring process for positions that require pre-employment, medically related testing, which are provided to interested applicants. The executive director for Human Resources and Student Services should then develop and distribute a conditional offer of employment letter for departments to use. The executive director for Human Resources and Student Services should train district staff in the use of the conditional employment letter. Department heads should provide a copy of the conditional employment letter and testing results to the HR Department to document compliance with federal and state law.

PERSONNEL MANAGEMENT SYSTEM CAPABILITIES (REC. 63)
SSAISD staff has not fully implemented the personnel management and reporting tools available in the personnel module of the district's business software system, the Internet Texas Computer Cooperative Software (iTCCS). The district is in its implementation year for the personnel portion of iTCCS. The position management system was implemented in November of 2003. Payroll was implemented in January of 2004. Employees in both

personnel and payroll have received technical training on the system. During conversion to the new system, HR Department staff is maintaining spreadsheets of position and salary information.

The personnel and payroll modules are integrated, sharing 78 data elements related to demographic and employment information. The personnel module is primarily a position management application that associates employment information with board-approved positions. The personnel module captures and reports PEIMS personnel information to the Texas Education Agency as required by law. It also tracks insurance and benefits information. The payroll application applies salary, leave, and benefits utilization and calculates the employee's paycheck.

Although the iTCCS tracks employee rosters and salary information, the Human Resources Department kept employee roster and compensation information on spreadsheets at the time of the review in May 2004. The spreadsheet roster lists annual salary information, but is not used to track authorized overtime. The spreadsheet notes if a position became vacant, and also includes notations about employees on leave. The leave notations are abbreviated, and do not provide details such as the date the leave was initiated. Not all leave is noted on the sheet. For example, a district police officer has been on military leave in Iraq for approximately 18 months. The spreadsheet does not have a military leave notation.

The executive director for Human Resources and Student Services approves all overtime requests on a manual form. The executive director for Business and Finance Services then approves the form. When the review team asked for an overtime report by employee, the district could only produce a report on overtime payments by accounting fund. The report did not provide sufficient detail to support management decisions in controlling overtime expenditures.

The iTCCS system has leave codes that are assignable by the district according to district leave policy. The codes could distinguish between military, workers' compensation, or other leave types allowing the district to track and monitor leave balances electronically. Instead of using electronic tracking, the Payroll Department is manually tracking military, workers compensation, and family medical leave. Payroll clerks keep individual employee files at their desk until the employee returns from leave. No department could produce a report showing employees on leave without pay, nor could the review team obtain a report on how long individual employees had been absent. The payroll manager said the district could produce a report on leave

balances per employee. The Payroll Department also indicated it could produce a report showing active and inactive employees. The Human Resources Department could not provide a report on active and inactive employees.

The Payroll Department only knows the type of leave used as written on the timesheet or pay report. The Payroll Department only knows if an employee is on family medical leave or military leave if the Human Resources Department sends the paperwork to them.

According to representatives from Region 20, districts set up "extended leave" positions in the position management system. This allows the district to fill the authorized position with a substitute employee for the duration of the leave. It also provides a tracking mechanism for leave utilization in the personnel management system. Properly configured, the Region 20 software application can capture and report on a variety of personnel actions.

The district's existing agreement with Region 20 includes access to the modules and training from regional staff at no additional cost. The executive director for Human Resources and Student Services should work with the executive director for Business and Finance Services to identify payroll and personnel system capabilities that the district wants to activate to efficiently capture, track, and provide personnel management information to the executive directors as well as administrators and department heads. The executive directors should then jointly identify and designate three to four key users and contact Region 20 to obtain "train-the-trainer" training to develop staff with in-depth knowledge and understanding of the system. The key users should then provide training to department and campus staff in using the capabilities of the system.

EMPLOYEE HANDBOOK AND PERSONNEL NOTICE UPDATES (REC. 64)

The Human Resources Department does not have a process to ensure that employee handbooks and required personnel-related notices are up-to-date and efficiently communicated to all employees. The substitute and the manual trades/clerical handbooks provided by the HR Department are not current. The substitute manual for example, shows the school calendar for 2003–04, but another page introduced staff by positions that do not currently exist. The auxiliary personnel manual included the 2000–01 school calendar and Board of Trustees. There is no handbook for supervisors or administrators. The teacher handbook, however, is annually updated and maintained by the Curriculum, Instruction, and Assessment Services Department. Teachers turn in

old manuals and receive updated manuals each school year.

The district does not post any existing handbooks on its website as a tool for efficient communication to all employees. Auxiliary employees and substitutes receive a manual on their first day of employment, but do not receive periodic updates.

In addition, personnel-related notices are not up-to-date in several district locations. Federal and state law requires notification to employees relating to workers compensation, family medical leave, and civil rights processes. Employers must post the information in areas where employees gather. Current notices are posted in the interview room of the HR Department, although no notices were posted in the nearby break room most frequented by employees. However, the posted notices were not current and not all required notices were posted in the Police Department and Maintenance Department offices.

To ensure compliance with state and federal laws, many districts implement periodic reviews of locations where personnel-related notices are posted to ensure they are correct and up-to-date. They also implement an annual review and update process for their employee manuals. An up-to-date manual communicates an organization's principles and practices and effectively explains an employee's rights and remedies. It also increases compliance and reduces misunderstandings by ensuring that policies are consistently communicated. Current handbooks help to ensure staff is aware of and understands policies and consistently follows the same procedures.

Many districts efficiently communicate policies and procedures by posting their employee handbooks on their websites. The Fort Worth Independent School District posts its employee handbook on its website. The handbook includes appropriate disclaimers, and is periodically updated. The district's Web handbook was last updated January 2004.

The executive director for Human Resources and Student Services should develop an annual schedule and assign HR Department staff to review all district work locations to ensure required notices are current and properly posted. The executive director for Human Resources and Student Services should also develop an annual review schedule for all employee handbooks and coordinate with HR Department staff and the Curriculum, Instruction, and Assessment Services Department to update all written employee handbooks as new policies are adopted or laws change. In addition to updating the written handbook, the executive director for Human Resources and Student Services should work with

the district webmaster to place all employee handbooks on the district website and to update the website handbooks as new policies are adopted or laws change. When policies or procedures change, the district should require a written certification from employees that they have read and understood the changes.

EMPLOYEE ORIENTATION PROGRAM (REC. 65)

SSAISD does not provide a consistent orientation program to all employees. When a new employee starts work, they are instructed to report to the HR Department. Staff makes sure the new employee provides all required information necessary to begin employment. For substitutes, manual trades, or clerical positions, staff provides a copy of the appropriate handbook. Human Resources Department staff also orients the new employee by pointing out important concerns such as anti-discrimination or harassment policies. Certain positions, such as custodial positions, may be given a copy of their job description.

Teachers receive a handbook and job description from their assigned principal. Teachers and professional and auxiliary staff receive additional information on procedures such as payroll and leave from their assigned department. This is the extent of the orientation process.

Many topics necessary to school district business are not covered in either orientation. For example, basic safety instructions are not routinely covered for all employees. Information on state laws regarding purchasing is not provided, although there are criminal penalties for violations. Privacy requirements associated with the Family Educational Rights and Privacy Act (FERPA), which affect districts, are also not covered. Incorporating topics such as these into a consistent orientation program could help the district reduce risks of non-compliance with law or district policy.

The executive director for Human Resources and Student Services should develop a standard presentation that can be easily delivered by any HR Department staff. The presentation should include personnel-related topics such as anti-discrimination or harassment as well as safety and purchasing policies. In addition to the written presentation, the executive director for Human Resources and Student Services should work with the Career and Technology Education Department staff to develop a taped video presentation in VHS or DVD format that can be checked out and viewed by new employees at their respective campus or department.

ANALYSIS OF PERSONNEL AND HUMAN RESOURCES INFORMATION (REC. 66)

The Human Resources Department does not routinely analyze collected departmental data. The HR Department is a collection point for information about hiring, attendance, discipline, overtime, grievances, and terminations. However, unless specifically requested, the departmental staff do not routinely provide management reports to administrators or to the board on personnel issues. They do not analyze HR initiatives and report on identified trends or performance.

Information provided to the board is frequently associated with budget issues. The request for information may be generated individually by a board member via memorandum or may occur as part of the budget preparation process. For example, the HR Department provides the analysis for development of Early Retirement Incentive Programs. They also provided a market salary survey during the 2003–04 budget process. The executive director for Human Resources and Student Services provides budget projections when the board considers compensation increases.

As an example, although the HR Department manages the system that locates substitute teachers and accumulates data about teacher absences, it does not analyze or report these data. With attendance information, central administration can compare absenteeism by department or supervisor. Supervisors can determine if a pattern of absences exist, such as getting sick only on Mondays. Absences can also signal a need for managers to offer family medical leave under federal law.

In another example, the HR Department staff initiates the new employee paperwork and finalizes the termination paperwork. However, staff do not routinely review associated personnel performance measurements. As the district's recruiters, department staff knows when vacancies occur and when vacancies are filled. Standard hiring measurements include the length of time it takes to fill a vacant position, and how many positions are unfilled when the new school year starts is collected, but this information is not compiled or reported.

The district also has an exit interview form and termination survey and a policy that requires supervisors to conduct exit interviews with separating employees. The HR Department does not conduct trend analysis of any returned documentation. Staff does not analyze turnover to determine the reasons for employment separation or report turnover by department or other categories potentially helpful in developing strategies for reducing turnover. Understanding why an employee leaves allows an organization to improve recruitment and retention strategies and can provide insight into the effectiveness of district policy and procedure.

Analyzing personnel data trends can assist the district in effectively managing personnel. Trend analysis can assist the district in developing targeted recruitment and retention strategies as well as providing administrators with valuable information to address employee absenteeism and leave issues. The HR Department for the Galena Park Independent School District provides district administrators with reports containing information necessary for effective personnel management. Principals receive attendance reports that show patterns of absenteeism. The board receives information on employee turnover, vacancy rates, and other measures of strategic Human Resources initiatives. Many districts develop and implement processes to compile, analyze, and report management information and performance measures to managers and administrators.

The executive director for Human Resources and Student Services should survey district managers and administrators to determine the type of information or reports that would support decision-making efforts. Based on survey results, the district should develop processes to compile, analyze, and report management information and performance measures to managers and administrators. The executive director for Human Resources should work with representatives from Region 20, the director of Technology and selected districtwide directors to identify the most efficient way to collect, compile, and report necessary data ensuring compatibility with any existing or newly implemented electronic reporting systems. Districtwide managers should identify and provide potential dates and/or time requirements for generated reports for use in a schedule developed and maintained by the executive director for Human Resources. The executive director for Human Resources and Student Services should then ensure Human Resources Department staff receive any necessary training in data disaggregation and reporting processes and provide identified report information to managers and administrators when appropriate and according to the identified schedule. The district should be able to use trend analysis in developing targeted recruitment and retention strategies as well as providing administrators with valuable information to address any issues, for example, that may arise regarding employee absenteeism and leave.

For background information on Human Resources Management, see page 166 in the General Information section of the Appendices.

FISCAL IMPACT

RECOMMENDATION	2004–05	2005–06	2006–07	2007–08	2008–09	FIVE-YEAR (COSTS) OR SAVINGS	ONE TIME (COSTS) OR SAVINGS
56. Upgrade three clerical positions to technical positions requiring human resources education and experience.	$10,072	$20,143	$20,143	$20,143	$20,143	$90,644	$0
57. Develop and implement a market-based compensation schedule and corresponding board policy.	$0	$0	$0	$0	$0	$0	$0
58. Adopt a policy of compensating non-exempt employees on the number of hours actually worked for extra jobs and reserve stipends for exempt positions.	$0	$0	$0	$0	$0	$0	$0
59. Amend district policy and require departments to use the payroll system to track and manage compensatory hours.	$0	$0	$0	$0	$0	$0	$0
60. Update job descriptions and develop and implement a schedule for ongoing periodic review.	$0	$0	$0	$0	$0	$0	$0
61. Update the district grievance policies to require response by the board within a designated time.	$0	$0	$0	$0	$0	$0	$0
62. Document testing procedures and develop and use a written conditional offer of employment letter for positions that require pre-employment, medical or physical testing.	$0	$0	$0	$0	$0	$0	$0
63. Obtain additional training to use the full capabilities of the Human Resource and Payroll modules of existing system software.	$0	$0	$0	$0	$0	$0	$0
64. Implement a review and update process for employee handbooks and required personnel-related postings and distribute the information electronically and in hard copy.	$0	$0	$0	$0	$0	$0	$0
65. Develop a consistent employee orientation program.	$0	$0	$0	$0	$0	$0	$0
66. Develop processes to compile, analyze, and report management information and performance measures to managers and administrators.	$0	$0	$0	$0	$0	$0	$0
Total	$10,072	$20,143	$20,143	$20,143	$20,143	$90,644	$0

CHAPTER 8
FINANCIAL AND RISK MANAGEMENT

The executive director for Business and Finance Services is responsible for financial management in South San Antonio Independent School District (SSAISD). He presents and recommends all business items to the board for consideration; coordinates budget activities for the district; oversees the investment of district funds; works with the district's financial advisor on new bond issues and the refunding of bonds; estimates and monitors state funding; and oversees the Business Services Department and its 16 associated staff, including two purchasing staff.

ACCOMPLISHMENTS

- SSAISD uses a cash flow spreadsheet to project cash needs and maximize the amount of funds invested.

FINDINGS

- The accounting and payroll functions have time consuming and paper intensive manual processes that increase staffing needs.

- SSAISD does not use a master budget calendar to define the timeline and steps used to develop the annual budget.

- The district has used the same audit firm since 1993–94 and has not issued a solicitation for audit services since May 1994.

- SSAISD has not fully implemented the external auditor's recommendations.

- The district's inventory records for items costing less than $5,000 are not up to date, contain numerous items that are no longer at the schools or departments, and do not include all items with asset tags.

RECOMMENDATIONS

- **Recommendation 67 (p. 126): Implement the time and position management software systems and reduce the number of positions in payroll and accounting.** The district should reduce the number of positions in payroll after the district has completed the implementation of the time management and position management and purchasing software. SSAISD should also reduce the number of accounting positions by using the accounts payable system to generate all checks.

- **Recommendation 68 (p. 127): Produce and disseminate a budget calendar that defines the timeline for budget development.** The executive director of Business and Finance Services should prepare a budget calendar that

outlines the schedule of events in the budget process with clear established timelines. The calendar should be disseminated to staff and made available to the community through the district's newsletters and the website.

- **Recommendation 69 (p. 128): Issue a solicitation for external audit services every five years to enhance auditor independence and ensure audit fees are competitive.** Using a formal solicitation process on a periodic basis should bring SSAISD procedure in line with the recommendations of the Government Finance Officers Association (GFOA). The district would ensure that they are obtaining the best service at the lowest price by using a formal solicitation process and negotiating services.

- **Recommendation 70 (p. 129): Implement external auditor recommendations and include accountability for implementation in the executive director for Business and Finance Services' job description**. The district should assign responsibility to specific individuals for implementing audit recommendations. The corrective action plans developed in response to the findings should include specific steps detailing individual responsibility in an effort to correct the reported finding and implement the external auditor's recommendation.

- **Recommendation 71 (p. 129): Conduct a districtwide physical inventory of all assets costing $500 to $4,999, update the comprehensive list, and ensure all employees adhere to administrative procedures to effectively add and/or delete items in a timely manner.** The district should update existing but outdated inventory lists and produce a comprehensive list of all assets by school and department for the purpose of conducting a physical inventory. The district should instruct schools and departments to appropriately identify any assets for addition or deletion and both central and campus administrators should adhere to existing procedures and complete the appropriate forms to add or remove any assets. By annually maintaining an updated inventory of items between $500 and $4,999 and completing the necessary documentation for missing or transferred items, the district has a more accurate basis for insurance purposes and mitigates the risk of denied claims for items reported as lost or stolen.

DETAILED ACCOMPLISHMENTS

CASH FLOW SPREADSHEETS

The district uses a cash flow spreadsheet to analyze the cash position of the general fund on a monthly basis and project cash needs and the amount available for investment. The spreadsheet was provided by one of the district's investment pools and contains three years of actual data.

The director of Business and Finance Services updates the cash flow spreadsheet monthly with actual data. Based on the historic trends of cash and investment inflows and outflows, the spreadsheet projects the district's cash requirements and the amounts available for investment. The spreadsheet provides the district with a core investment balance. The core investment balance is the amount of cash the district can invest over a longer term without having to use the funds for expenditures.

Based on the analysis, the district's core investment balance has grown from $5 million in September 2000 to $6.6 million in August 2003. The increase in the core investment balance reflects the district's increased fund balance.

DETAILED FINDINGS

PAYROLL AND ACCOUNTING FUNCTIONS (REC. 67)

The accounting and payroll functions have several time consuming and paper intensive manual processes that increase staffing needs. In payroll these include recording and inputting time worked by district employees, recording employee absences and accumulated leave, and inputting information to activate new employees in the payroll system. In accounting these include verifying funds available for all purchase orders issued by the district and manually issuing all checks for payments related to bonds and payroll liabilities.

Campuses and departments submit handwritten time cards to Payroll Department staff for all hourly employees. The handwritten entries include arrival and departure times and the number of daily and weekly hours worked. Staff in the Payroll Department review the cards for accuracy and investigate any found discrepancies. Once verified, Payroll Department staff handwrite the timecard information onto a transmittal document, generated by the payroll system and including an alphabetic employee name and social security listing.

In addition, each campus and department submits a weekly report to payroll along with any timecard or salary information that includes a listing of employees absent from duty. The absence information from the weekly report is also recorded manually on an individual's leave card. The leave card is the district's record of the days earned and used by each employee. All information entered into the district's payroll system comes from the transmittal documents.

If an employee works overtime or uses more than his/her amount of leave available, payroll manually calculates the overtime pay or the reduction in pay, respectively, and enters the information onto the transmittal sheet. The overtime pay is entered into the payroll system as a supplemental pay item for the system to include on the employee's paycheck. Likewise, any reduction in pay, or dock, is entered into the system in order to reduce an employee's pay.

To activate new employees, payroll receives a memo from personnel that includes the new employee's name, social security number, beginning date, number of days worked each year, hourly wage or salary information, budget number, TRS eligibility, insurance deduction, and number of exemptions claimed for income tax purposes. The Human Resources Department creates the employee on the system, but payroll inputs all of the information into the system and activates the employee for pay. Payroll takes all of the information from personnel and creates a folder for the individual's payroll file.

These time consuming, manual, and paper intensive processes require more employees to perform the payroll function than is necessary. Although the review team did not find any erroneous entries in the payroll system, manually transferring information from the time cards and weekly reports to the transmittal documents, and manually entering this information into the payroll system introduces the risk of errors into the payroll process.

SSAISD, with a 1,369.6 full-time-equivalent employee (FTE) count for 2003–04, has five payroll positions, which is a greater number than districts of comparable size. For example, Bryan ISD, with a 2,036.7 FTE count for 2003–04, has two and one-half payroll positions; and Hays Consolidated ISD, with a 1,252.9 FTE count for 2003–04, has two payroll positions.

The finance bookkeepers verify that funds are available in the account code listed for each purchase order. The bookkeeper receives the purchase order from the supervisor approving the purchase for the school or department and looks up the account on the finance system to ensure funds are available for the purchase. The purchase order is then forwarded to the general accountant for review of the coding before it is sent to purchasing for approval.

One of the bookkeepers manually prepares the checks for payments made from the bond funds. The bookkeeper receives the invoices related to bond

funds, manually prepares the check, forwards the invoice and check to the executive director for Business and Finance Services for review and approval, has the chief bookkeeper sign the check with the signature plate and issues the check to the vendor. Payroll liabilities are also paid with manually prepared checks. One of the bookkeepers reviews a spreadsheet of the payments deducted from employee payroll checks each month, transfers the funds for the manually prepared checks, and releases the checks for payment. An accounts payable clerk enters all manually prepared checks into the accounting system each day.

SSAISD had a budget of $77,560,906 for 2003–04 and a staff consisting of an executive director for Business and Finance Services, a director of Budget and Fiscal Services, a general accountant, three bookkeepers, and three accounts payable clerks.

SSAISD is in the process of implementing a time and position management system that will reduce the existing time consuming and paper intensive manual payroll processes. The time management system is being tested in transportation and at Hutchins Elementary. Once implemented, the time management system will be used by all hourly employees and will eliminate time cards and the manual entry of time worked into the payroll system.

The position management system is also in the testing phase. The district anticipates that Personnel Department staff will input all employee information in the position management system, which will then share the information with the payroll system. Payroll Department staff will review the information for accuracy before activating each employee within the system.

The district is also currently implementing the Kronus time–keeping system for all hourly employees. Planning, implementation, and training for use of the Kronus system occurred in 2003–04. The system software is installed and is currently being tested in September and October 2004. The district expects full implementation in November 2004. Full implementation should help the district reduce the need for staff to perform payroll tasks such as recording and inputting time worked by district employees, recording employee absences and accumulated leave, and calculating overtime.

The district is also in the process of implementing online purchasing software. As of July 2004, the district has held implementation and training meetings with Regional Education Service Center XX (Region 20) staff on system use and setting up system files. Once implemented, this software will eliminate the need for the bookkeepers to verify

funds in the respective accounts before a purchase order is issued.

Many districts have streamlined the payroll and accounting processes by implementing automated time management, position management, and purchasing systems. Many of these districts also generate all of their checks using the accounting system.

SSAISD should immediately implement the time and position management software systems and reduce the number of positions in payroll and accounting after ensuring that all data transfers are complete and accurate and that regular daily, weekly, and monthly operations occur within a reasonable and specified margin of error. Based on a comparison to districts with automated systems and a similar or larger number of employees, the payroll function is overstaffed by at least two employees. The district should also reduce the number of accounting positions. The district should use the accounts payable system to generate all checks. Since the checks must be entered into the system after they are issued, this will eliminate the time required to manually type the checks. Based on a comparison to districts with automated systems and a similar or larger budget, the accounting function is overstaffed by at least two clerical positions.

The estimated fiscal savings are based on eliminating the payroll clerk, the payroll bookkeeper with the least experience, and the two clerical accounting positions with the least experience. The total savings of $90,643 include salaries of $82,104 ($13,907 + $27,346 + $22,885 + $17,966 = $82,104) plus benefits of $8,539 ($82,104 x 10.4 percent = $8,539). Total savings will be $90,643 annually beginning in 2005–06 with first year savings of $45,322 in 2004–05 calculated at one-half the estimated annual savings for the following years ($90,643/2).

BUDGET CALENDAR (REC. 68)

The district does not use a master budget calendar to define the timeline and steps used to develop the annual budget. The budget process begins for schools and departments in March when the campuses receive their allocations. The budget development form is to be completed and returned in April. The information is compiled and a preliminary budget is printed for discussion by the administration.

Staff develops and presents a calendar to the board that includes the dates for the budget workshops with the Board of Trustees. The calendar from the truth-in-taxation information is used to provide a timeline for the adoption of the tax rate.

The administration had four workshops with the board in 2003 for the 2003–04 budget. During these workshops, the administration provided the board with preliminary budgets, estimated fund balances, analyses of property tax values, and analyses of property tax rates and their impact on the district and SSAISD's taxpayers. The administration also provided the board with comparisons of the preliminary budget for 2003–04 with the 2002–03 budget and actual expenditures, analyses of salary increases, and recommendations from the administration.

Although the appropriate steps are being taken in the budget development process, the majority of parents, citizens, and district employees are not aware of the extent of the budget process. Without a framework, they do not know when to bring budget issues forward to the administration or board and may be unaware of any opportunities to provide input into the process. The district has begun to address employee participation and awareness of the process with the formation of a budget committee for 2004–05. When completely formed, the committee will have one member from each school and department. The committee members will also represent each job classification in the district. The budget committee's purpose is to review budget requests, evaluate and rank requests, and provide a budget recommendation to the superintendent and school board for consideration and approval.

Many school districts have formal budget calendars that outline the budget process. Dripping Springs ISD has a budget calendar that it presents to the community regarding the schedule of events surrounding the budget process. This enables all stakeholders to know when and how the budget process works and when there are opportunities for community and staff to have input.

SSAISD should produce and disseminate a budget calendar that defines the timeline for budget development. The executive director of Business and Finance Services should prepare a budget calendar that outlines the schedule of events in the budget process. The budget calendar should then be provided to the superintendent for comment, suggestions, and final approval. The calendar should be disseminated to staff and made available to the community through the district's newsletters. The calendar should also be posted on the district's website to make it available to those who do not receive the district's other communications. The calendar should include opportunities for district employees to provide input into the discussions.

EXTERNAL AUDITORS (REC. 69)

The district has used the same audit firm since 1993–94 and has not issued a solicitation for audit services since the May 1994 selection. In 1993–94, the district sent a solicitation to eight firms and received seven responses. The district awarded the audit to its current firm for the 1993–94 audit, with an option to extend the agreement annually. The review team examined the district's 2000–01, 2001–02, and 2002–03 audits. Each audit includes the period between September 1 of the previous calendar year and August 31 of the next year. All of the audit reports stated that the financial statements were a fair representation of the district's financial condition and did not report any material weaknesses in internal controls.

The Texas Education Code (TEC) §44.008 requires school districts to undergo an annual external audit performed by a certified public accountant. The scope of the external audit is financial in nature and designed to provide reasonable assurance that the financial statements fairly present the financial condition of the district. External audits provide a review of the district's compliance with established standards and practices. The external audit provides an annual financial and compliance report, an examination of the expenditure of federal funds, and a report to management on internal accounting controls.

The Government Finance Officers Association (GFOA) recommends that governmental entities use a competitive process for the selection of independent auditors on a periodic basis and that the process actively seeks all qualified firms available to perform the annual audit. The GFOA states, "auditor independence would be enhanced by a policy requiring that the independent auditor be replaced at the end of the audit contract, as is often the case in the private sector." Based on the 1994 responses, SSAISD has sufficient competition in the market to rotate audit firms on a periodic basis. The firms also appear qualified, as five of the seven firms responding to the 1994 solicitation scored the same or better on the technical criteria the firm selected.

The GFOA also recommends multiyear agreements of at least five years in duration when obtaining the services of independent auditors. The GFOA states, "such agreements allow for greater continuity and help to minimize the potential for disruption in connection with the independent audit. Multiyear agreements can also help to reduce audit costs by allowing auditors to recover certain "startup" costs over several years, rather than over a single year."

Many school districts have established practices for the periodic use of a competitive process for the

procurement of external audit services. Hays Consolidated ISD (HCISD) enters into multi-year contracts with external audit firms and seeks proposals at the end of the contract term, usually every five years. Their practice does not exclude the possibility of the audit firm being re-engaged by the district when proposals are received. HCISD has continuity in the audit process and is assured the fees are competitive.

SSAISD should issue a solicitation for external audit services every five years to enhance auditor independence and ensure audit fees are competitive. Using a formal solicitation process on a periodic basis would bring SSAISD procedures in line with the recommendations of the Government Finance Officers Association (GFOA). The district would ensure that it is obtaining the best service at the lowest price using a solicitation and negotiation process. SSAISD should send its solicitation to audit firms used by other school districts in the Region 20 area to expand the number of qualified firms. If the current auditor's performance is satisfactory, the district should include the current auditor in the solicitation process.

IMPLEMENTATION OF EXTERNAL AUDIT RECOMMENDATIONS (REC. 70)

The district does not fully implement external auditor recommendations. The district responds with corrective action plans for each comment and recommendation made by the external auditor; however, repeated comments and recommendations for the same areas demonstrate that the district has not fully implemented the corrective action plans. The district does not assign accountability to an individual responsible for implementing these recommendations. **Exhibit 8–1** presents a summary of auditor comments and district responses for 2000–01 through 2002–03.

The district's management letter comments and responses indicated that the district has fully implemented some recommendations such as the payroll fund liability account balance reconciliation and fixed asset training.

The auditor also noted several findings in the schedule of findings and questioned costs in 2000–01 through 2002–03. All of the corrective action plans for these findings were implemented, except for the finding concerning the food service fund balance. The district exceeded the allowed fund balance in the food service fund during this period.

Some school districts use a formal reporting system to track the implementation of audit recommendations through the use of corrective

action plans. These systems define responsibility for implementation of the recommendation to a specific district employee to provide individual accountability for the corrective action plan. The corrective action plans of these districts provide specific steps for the individual responsible in an effort to correct the reported finding and implement the auditor's recommendation. These systems require periodic reporting of the progress of the district in implementing the corrective action plan to assure the board and administration that any identified deficiency is being corrected.

SSAISD should implement external auditor recommendations and establish accountability for implementation in the executive director for Business and Finance Services' job description. The district should assign responsibility to specific individuals for implementing the audit recommendations. The corrective action plans developed in response to the findings should include specific steps for each individual in an effort to correct the reported finding and implement the auditor's recommendation. If the district disagrees with an auditor's recommendation, the response should indicate the disagreement and justify the district's position on the issue. The superintendent should provide progress reports to the board on a periodic basis. The progress reports should include documentation of the implementation of the recommendations.

INVENTORY RECORDS (REC. 71)

The district's inventory records for items costing less than $5,000 are not up-to-date, contain numerous items that are no longer at the schools or departments, and do not include all items with asset tags. A review of the completed inventories found numerous notations that items were not found or that items were transferred to the warehouse in prior years. The review team selected four items with tags and requested the general accountant to locate them in the fixed asset tracking system. None of the items were in the asset management system or on the spreadsheets.

Some of the items on the inventory list and noted as no longer being at the school included the following: 16 mm film projectors, Apple IIE computers, Tandy printers, TRS 80 computers, typewriters, and duplicating machines. These items were still on the inventory list provided to the review team.

One set of items at a high school had a notation that the items were sent to the warehouse seven years ago and that they had requested these items be deleted in the last inventory. The review team saw a number of plastic–wrapped pallets of computers and other equipment stored at the warehouse. The general

EXHIBIT 8–1
MANAGEMENT LETTER COMMENTS AND SSAISD RESPONSES
2000–01 THROUGH 2002–03

YEAR	MANAGEMENT LETTER COMMENT	DISTRICT RESPONSE
2002–03	Inter-fund account balances do not reconcile with subsequent transfers. The director of Budgeting should reconcile inter-fund accounts at month's-end.	The director of Budgeting will continue to monitor inter-fund account balances and prepare reconciling entries in a timely manner.
	The district should contact Region 20 and request real time account payable balances and aged payable reporting.	The Business Office staff will continue to review the recording of all invoices received into the online accounts payable system.
	The district does not have documented procedures at its warehouse for receiving merchandise.	The Business Office will work with the Maintenance Department to establish formalized warehouse receiving procedures.
	Access to the warehouse should be controlled and inventory employees should be bonded.	The business office will continue to look into the feasibility of bonding warehouse inventory employees.
	Recommend that personnel continue to attend future training on fixed assets to maintain compliance with standards.	The business office will contact Region 20 regarding training sessions and review compliance with GASB 34 requirements.
2001–02	Payroll fund liability account balances did not reconcile with subsequent payment amounts and the payroll bank account did not reconcile to the general ledger.	Business office staff will reconcile the payroll liability balances during the year and will review and reconcile all bank accounts on a monthly basis.
	Inter-fund account balances do not reconcile with subsequent transfers. The director of Budgeting should reconcile inter-fund accounts at month-end.	The director of Budgeting will continue to monitor inter-fund account balances and prepare reconciling entries in a timely manner.
	The district should contact Region 20 and request real time account payable balances and aged payable reporting.	The Business Office staff will continue to review the recording of all invoices received into the online accounts payable system.
	The district does not have documented procedures at its warehouse for receiving merchandise.	The Business Office will work with the Maintenance Department to establish formalized warehouse receiving procedures.
	Access to the warehouse should be controlled and inventory employees should be bonded.	The business office will continue to look into the feasibility of bonding warehouse inventory employees.
	Recommend that personnel responsible for fixed assets attend training on the required fixed assets summary in governmental accounting standards.	The Business Office will contact Region 20 regarding training sessions and review compliance with GASB 34 requirements.
2000–01	Payroll fund liability account balances did not reconcile with subsequent payment amounts and some were a debit balance.	The Business Office staff will reconcile the payroll liability balances during the year.
	Inter–fund account balances do not reconcile with subsequent transfers. The director of Budgeting should reconcile inter–fund accounts at month's–end.	The Business Office will continue to monitor inter–fund account balances and prepare reconciling entries in a timely manner.
	The district should review external automation of its accounts payable system that would integrate with the Region 20 system.	The Business Office staff will continue to review the recording of all invoices received into the online accounts payable system.
	The district does not have documented procedures at its warehouse for receiving merchandise.	The Business Office will communicate with the Maintenance Department the necessity to establish formalized warehouse receiving procedures.
	Access to the warehouse should be controlled and inventory employees should be bonded.	The Business Office will look into the feasibility of bonding warehouse inventory employees.
	The district will have to be in full compliance with GASB 34 next year.	The business office will contact Region 20 regarding their fixed asset program and its compliance with GASB 34 requirements. The Business Office will review the district's capitalization policy to meet GASB 34 requirements.

Source: SSAISD, external auditor management letters and responses, 2000–01 through 2002–03.

accountant said items cannot be removed from the listing without a transfer form signed by the warehouse or a police report that shows the items as missing.

By not removing assets from the inventory listing that are no longer at the schools or departments, the district minimizes the importance of the physical inventories to the schools and departments and reduces its chance of obtaining timely and accurate future inventories from these same groups. The district also increases the possibility that insurance claims may be denied for lost items because the inventory lists contain many items that no longer exist at the schools and departments.

Many school districts inventory assets costing less than $5,000, such as furniture and equipment, on a periodic basis and included as a job expectation of identified personnel. Most districts list discrepancies

between the inventory list and what is on hand to make sure all assets inventoried are added to the listing and that missing items are written off the district's financial records in accordance with established policy. These districts ensure the safety of assets by maintaining an accurate listing.

SSAISD should inventory all assets costing from $500 to $4,999, add unlisted items to the inventory, and delete missing items from the inventory. The district should produce a listing of all assets by school and department for the purpose of

conducting a physical inventory. The schools and departments should be instructed that all assets on the list but not at the school or department be noted as such and that these assets be removed from the listing. The schools and departments should also note any tagged assets at their location that are not on the listing. The asset listing should be updated to include all the information obtained from the inventory.

For background information on Financial and Risk Management, see page 167 in the General Information section of the Appendices.

FISCAL IMPACT

RECOMMENDATION	2004–05	2005–06	2006–07	2007–08	2008–09	FIVE–YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
67. Implement the time and position management systems and reduce the number of positions in payroll and accounting.	$45,322	$90,643	$90,643	$90,643	$90,643	$407,894	$0
68. Produce and disseminate a budget calendar that defines the timeline for budget development.	$0	$0	$0	$0	$0	$0	$0
69. Issue a solicitation for external audit services every five years to enhance independence in auditor selection and ensure audit fees are competitive.	$0	$0	$0	$0	$0	$0	$0
70. Implement external auditor recommendations and include accountability for implementation in the executive director for Business and Finance Services' job description.	$0	$0	$0	$0	$0	$0	$0
71. Conduct a districtwide physical inventory of all assets costing $500 to $4,999, update the comprehensive list, and ensure all employees adhere to administrative procedures to effectively add and/or delete items in a timely manner.	$0	$0	$0	$0	$0	$0	$0
Total	$45,322	$90,643	$90,643	$90,643	$90,643	$407,894	$0

CHAPTER 9
FOOD SERVICES

Since 1996, South San Antonio Independent School District has been designated as a Provision 2 program under the National School Lunch Program (NSLP), and all students enrolled in SSAISD eat free. SSAISD's Food Services Department efficiently prepares and serves more than two million meals each year at an above average industry standard of 18.3 meals per labor hour (MPLH) to students in 10 elementary schools, three middle schools, and two high schools. During 2000–01 through 2002–03, the district's financial audits show that the Food Services Department has maintained a year-end fund balance that is higher than allowed by law. In 2002–03, that balance exceeded $2.2 million.

ACCOMPLISHMENTS

- SSAISD's implementation of its Coordinated Health Program emphasizes student service and learning to improve overall student and community health.

- SSAISD has cross-trained staff that can be shared among its cafeterias to maintain productivity during employee absences.

- The Food Services Department spreadsheet profit and loss model provides an efficient and cost effective means to monitor and report financial performance.

- The direct grocery delivery to cafeterias reduces storage and staffing costs and increases the efficiency of the food service warehouse.

FINDINGS

- SSAISD does not have a process to ensure compliance with federally mandated guidelines for food service fund balance.

- The district does not have competitive starting salaries for its food service employees.

- The department is partially funding clerical positions from the Food Services Department budget that are no longer necessary for food service operations.

- SSAISD's Food Services Department budget does not fund overhead costs for business office and maintenance support provided to its operations.

- The district does not have an employee handbook that is up to date or translated into Spanish.

- SSAISD does not have an incentive program for its manager trainees.

RECOMMENDATIONS

- **Recommendation 72 (p. 135): Implement a process to prevent excess fund balance for the Food Services Department.** The district should mitigate any future risk of excessive fund balances by modifying the department's existing profit and loss model to add the capability to project revenue and expenditure requirements and include the effect on ending fund balance. In addition, the district should also identify projected uses of fund balance and submit them as a plan to the board during the annual budget process to allow pre-approved expenditures of Food Services Department fund balance once thresholds are reached.

- **Recommendation 73 (p. 136): Implement compensation study increases for Food Service employees.** The district can more equitably compensate its food service employees and improve retention and recruiting efforts by voting to raise the salaries of its Food Service workers. A salary increase can be funded from the existing Food Service fund balance at no net impact to the district's general fund balance.

- **Recommendation 74 (p. 137): Eliminate the two partially funded clerical positions.** The director of Food Services should meet with the executive director for Business and Finance Services to remove the funding of the clerical positions from the Food Services Department budget. Eliminating the two partially funded clerical positions will result in a reduction in department expenditures.

- **Recommendation 75 (p. 137): Allocate funding to cover costs for business support provided to the Food Services Department.** The director of Food Services should meet with the executive director for Business and Finance Services to analyze support provided and document a cost allocation methodology. The analysis should reflect the staff, supervisory time, and materials spent for payroll, personnel, accounting, and purchasing functions.

- **Recommendation 76 (p. 138): Translate the Food Services Department handbook into Spanish and update on an annual basis.** The director of Food Services should work with Food Services Department central office staff that is bilingual to update and translate the written handbook. Once the handbook has been updated, the director of Food Services should assign responsibility to staff and identify a

schedule for annually reviewing and updating the handbook to ensure that the department handbook remains current.

- **Recommendation 77 (p. 139): Implement an incentive program for manager trainees.** The director of Food Services should work with the executive director for Human Resources and Student Services to develop an incentive program. An incentive program tied to job duties, training, and certification encourages staff to become manager trainees, assume additional duties, and obtain additional training and certification.

DETAILED ACCOMPLISHMENTS

COORDINATED HEALTH PROGRAM

SSAISD has implemented a Coordinated Health Program to improve student nutrition and health as a student service-learning project. In 2003–04, SSAISD researched various programs in place in other San Antonio schools and selected a school-based diabetes prevention program developed by a local physician. The selected program is in use in Edgewood and San Antonio ISDs and has been submitted to the Texas Education Agency (TEA) for approval.

The district focused the program to be a service-learning project for students with an emphasis on learning about nutrition and healthy choices and applying that knowledge to improve their community. SSAISD has funded the program from a service-learning grant. To evaluate results, SSAISD's program consists of three control schools where the program is not implemented and three target schools, Athens, Royalgate, and Palo Alto Elementary Schools, where it is implemented. Results from the control and target schools will be compared to evaluate the program's effects.

The program contains four components: a health curriculum; an after-school health club where students are encouraged to stay and exercise; the Family Fun Fiesta, where parents meet to discuss and prepare healthy meals; and the School Food Service Program that teaches cafeteria staff nutrition concepts and methods to encourage students to eat more fruits and vegetables. Students earn play money for completing activities and making healthy choices. The play money can be used to purchase items such as basketballs and tee shirts from the program's store.

Results from the SSAISD study are not complete, but in 2000–01, the average blood sugar level for students from various districts participating in the program dropped from 121 to 91.

CROSS-TRAINING OF STAFF

SSAISD maintains productivity by fully cross-training and sharing staff during employee shortages. All SSAISD staff is cross-trained and able to rotate among district cafeterias. Cafeteria managers at each school train staff by rotating them to perform all duties. The frequency of rotations varies among cafeterias. Some rotate weekly, while others rotate less frequently such as monthly. Fully trained staff allows the district to share staff among its cafeterias when there are shortages. When a cafeteria is short staffed by more than one employee and substitutes are not available, the cafeteria manager calls the food services supervisor to request assistance in filling the shortage. The field supervisor calls the other schools and coordinates the temporary loan of a cafeteria worker. This practice maintains productivity because an experienced worker fills in when personnel are absent because of illness or vacation.

PROFIT AND LOSS MODEL

SSAISD has developed a spreadsheet profit and loss model to efficiently monitor its Provision 2 food service operations and file claims for reimbursement. The district's point-of-sale (POS) system does not have a financial reporting module and its financial system is not user friendly in extracting reports to use for financial analysis and reporting. To address these shortcomings with the POS system, the director of Food Services developed a spreadsheet-based profit and loss model that consists of an Excel™ workbook with several linked simple and easy to use spreadsheets.

The director of Food Services identified the financial measures that he wanted to track on a monthly and cumulative basis including the following:

- Food service budget by category (revenues and expenditures);

- Monthly and year-to-date financial measures, such as revenues and expenditures by source, including profit and loss by cafeteria;

- Summary and per cafeteria operating statistics such as food, labor, and other costs per meal;

- Average daily participation for breakfast and lunch;

- Meals per labor hour by cafeteria; and

- Total cost and revenue per meal.

The spreadsheet workbook contains five linked spreadsheets: a meals and claim spreadsheet that includes a MPLH analysis, a monthly profit and loss calculation by cafeteria, a summary of year-to-date profit and loss, a department recap that summarizes information for the board, and a summary of the

department budget. The director of Food Services inputs labor, food, and meal counts from tracking sheets into the model. The model automatically generates the MPLH calculations from the meal counts entered and calculates the reimbursement. It also automatically generates the department recap.

Besides monitoring revenues and expenditures, the model allows the director of Food Services to calculate and validate monthly reimbursements for both the NSLP and School Breakfast Program (SBP) to present summary financial information for the Board of Trustees at their monthly meetings and to assist cafeteria managers in monitoring their cafeterias' financial performance.

The director of Food Services estimates that it takes one to 1.5 hours a month to update the model. Regional Education Service Center XX (Region 20) asked the director of Food Services to demonstrate the model to 25 districts.

DIRECT GROCERY DELIVERY TO CAFETERIAS

SSAISD's Food Services Department implemented direct grocery delivery to cafeterias to save money and use the central food service warehouse more efficiently. In January 2004, SSAISD implemented direct grocery delivery from the Region 20 cooperative supplier, Labatt Food Service, to individual cafeterias. Before direct grocery delivery was implemented, the weekly grocery order was delivered to the central food service warehouse, inventoried, and then distributed by food service staff to the individual cafeterias.

The director of Food Services met with Labatt representatives to request direct delivery and jointly develop acceptable schedules. SSAISD worked with Labatt to ensure delivery schedule times did not create traffic and safety problems for the schools by occurring during student drop-off and pick-up times or disrupt meal preparation and serving times. Labatt sends two trucks to the district each Friday. The first truck delivers food to eight cafeterias, and the second truck delivers food to the remaining seven cafeterias. The deliveries are scheduled for schools that are located close to each other.

With direct grocery delivery, the district's food service warehouse can be used to store commodities instead of groceries. This reduces the storage fees

paid for commodities. For example, the commodity storage fees in October 2003 before direct grocery delivery was implemented were $6,240. By contrast, the storage fees in April 2004 after implementation were $1,559, representing a savings of $4,681 a month. The director of Food Services estimates savings of approximately $48,000 annually in storage costs.

In addition, the district no longer requires the same staffing levels for its food service warehouse. The food service warehouse has four staff. With direct grocery delivery, the director of Food Services estimates that staffing can be restructured to two employees, resulting in estimated savings of $46,000 annually.

DETAILED FINDINGS

FOOD SERVICE DEPARTMENT FUND BALANCE (REC. 72)

SSAISD does not have a process to ensure compliance with federally mandated guidelines for child nutrition department fund balance levels. The NSLP guidelines require participating programs to operate a non-profit food service operation. Section 1.3.2.4 of TEA's *Financial Accountability System Resource Guide* states that a school district may not have a child nutrition fund balance exceeding three months' average food service operations expenditures. If a district's child nutrition fund exceeds the allowable balance, the school district must either reduce the balance or have an acceptable plan to reduce the surplus within a year. If a district takes no action, they place themselves at risk of having to return the surplus dollars to the Texas Department of Agriculture (TDA). The district must submit the reduction plan to TDA's Child Nutrition Program Division.

SSAISD's external auditors have repeatedly cited the district for noncompliance for child nutrition fund balance levels (**Exhibit 9–1**). Each time it was cited, the district identified expenditures to reduce the fund balance.

While SSAISD corrected the excessive fund balance when it was noted or submitted appropriate corrective plans, the district did not create a process that would prevent further occurrences. The director of Food Services has identified long-term uses of fund balance to address the compliance issue;

EXHIBIT 9–1
SSAISD FOOD SERVICES DEPARTMENT
EXCESS FUND BALANCE AMOUNTS
2000–01 THROUGH 2002–03

AUDIT FINDING	2000–01	2001–02	2002–03
Ending Fund Balance Amount	$2,662,226	$1,905,296	$2,225,109
Fund Balance Excess Amount	$1,188,000	$11,100	$549,090

SOURCE: SSAISD, annual audited financial reports, 2000–01 through 2002–03.

however, the planned expenditures have not been pre-approved by the board and have not been linked to projected fund balance thresholds. The comprehensive spreadsheet profit and loss model developed by the director of Food Services is used to monitor expenditures but is not used to project cash flow requirements and estimate the ending fund balance timely to trigger expenditures as thresholds are approached.

School district food service operations constantly monitor fund balance limits to ensure compliance with NSLP. As thresholds are approached, the districts put the funds to pre-determined uses. SSAISD continues its risk of noncompliance as long as it does not have a process to identify and promptly expend excess fund balances.

The director of Food Services should work with the executive director for Business and Finance Services and modify the department's existing profit and loss model to add the capability to project revenue and expenditure requirements and include the effect on ending fund balance. The director of Food Services should also identify projected uses of fund balance and submit them as a plan to the board during the annual budget process to allow pre-approved expenditures of Food Services Department fund balance once thresholds are reached.

The board's approval should include the ability for the Food Services Department to expend the fund balance as identified in the plan once thresholds are reached. The plan can be amended and resubmitted to the board as needs change during the year. To maintain strong internal controls over the release of fund balance for the pre-approved expenditures, the board should require that the executive director for Business and Finance Services verify that thresholds have been reached and approve the actual release of fund balance for the expenditure.

FOOD SERVICE EMPLOYEE SALARY RANGE (REC. 73)

SSAISD does not have competitive starting salaries for its food service employees. SSAISD's food service worker and porter positions are classified as a job grade 1A, with a minimum starting salary of

$5.80 an hour and a maximum salary of $8.46 an hour. The director of Food Services did an informal salary survey and found that starting pay rates for SSAISD were not comparable to those of neighboring districts (**Exhibit 9–2**).

SSAISD ranked last of all districts compared, with starting salaries that were more than $1.00 less per hour than the next lowest ranked district Edgewood ISD and almost $3.00 less per hour than the highest ranked district, San Antonio ISD.

Low wages affect the district's ability to attract substitutes, fill vacant positions, and retain staff. In May 2004, staffing data initially provided to the review team showed that of the 136 total food service positions, there were 17 vacancies, representing a 12.5 percent vacancy rate. Staffing data also showed that 38.2 percent of food service positions (52 of 136) had less than two years experience. SSAISD is aware that its salaries are not competitive and hired the Texas Association of School Boards (TASB) to conduct a salary survey for all positions. The survey results, provided in August 2004, confirmed that the district's minimum salary range compared to market benchmarks was under market by 20 percent or more for cafeteria managers and food service workers.

Paying comparable wages to reduce turnover, retain staff, and attract substitutes is important because it affects the quality and productivity of a food service program. Productivity is affected since new employees are not as productive as existing employees because of the learning curve. Quality is also affected until new employees are fully trained. Productivity and quality are also affected when there are vacancies and there are not enough substitutes to fill in for the vacancies. In these situations, existing cafeteria staff must work short handed. Constant turnover also costs the district money for uniforms. Each food service worker is provided an annual $200 uniform allowance. When an employee leaves, there is no requirement to return purchased uniforms or repay the allowance.

Effective organizations constantly monitor and adjust salaries to remain competitive within their

EXHIBIT 9–2
SAN ANTONIO AREA COMPARATIVE WAGE SURVEY
2003–04

DISTRICT	STARTING PAY RATE
San Antonio ISD	$8.75
Harlandale ISD	$8.00
Southwest ISD	$7.45
Northside ISD	$7.07
Edgewood ISD	$7.00
South San Antonio ISD	**$5.80**

SOURCE: SSAISD, director of Food Services, May 2004.

labor market, often using salary studies performed by agencies such as TASB.

In late August 2004, the board received a summary report from TASB conducted in spring 2004. In general, for manual trades positions such as food service employees, the TASB study recommends increasing the pay scale minimum rates; awarding equity increases to employees whose pay is below the recommended pay grade minimum, increasing their pay to 1.5 percent above the minimum; and providing a midpoint percentage increase of 3 percent. The board should increase food service employee salaries as detailed in the TASB salary study. This study details percentage increases for minimum, mid-point, and maximum hourly wages for all food service workers and also includes equity adjustments. By voting to raise the salaries of its food service workers, the district can more equitably compensate its employees in this category and improve retention and recruiting efforts.

The fiscal impact is based upon the TASB total departmental salary increase estimate of $80,278 per year plus fringe benefits of 27.95 percent ($22,438) for a total annual adjustment of $102,716 ($80,278+$22,438=$102,716). The district should immediately implement this salary increase, in total, for 2004–05.

CLERICAL POSITIONS (REC. 74)
The district is partially funding clerical positions that are no longer necessary for food service operations. Staffing data provided showed two clerical positions at the high school campuses that were funded 50 percent by food service funds. According to the executive director for Business and Finance Services, the two positions were initially used to process identification cards for meals, process applications, and assist in cashiering at the cafeterias.

The need to process applications and qualify students for free and reduced-price lunches has been significantly reduced, with applications required only when new schools are opened and for new students coding into the Public Education Information Management System (PEIMS) because of the district's Provision 2 status. The clerical staff at the campuses are no longer needed to perform this function. In addition, the cafeteria operations have become more efficient and cashiering assistance is no longer necessary.

Using ongoing food service funding for positions that are not directly related to operating the food service program is not an allowable expenditure under federal NSLP guidelines. The district increases its risk of noncompliance if funding is continued.

Penalties may be assessed if the district is not in compliance.

The director of Food Services should meet with the executive director for Business and Finance Services to remove the funding of the clerical positions from the Food Services Department budget. Detailed monthly payroll reports identifying each position by name that is charged to the food services fund should be provided to the head of the Food Services Department. The director of Food Services should monitor the reports to ensure that all labor costs reflect positions that are performing actual food service duties.

The current amount funded by the Food Services Department for the two positions is $15,662 plus benefits of 10.4 percent ($15,662 x 0.104 = $1,629) for a total of $17,291.

DEPARTMENT OVERHEAD COSTS (REC. 75)
SSAISD's Food Services Department budget does not fund overhead costs for business office and maintenance support provided to its operations. The Food Services Department budget pays for the following costs:

- Capital equipment;
- Custodial services;
- Travel and staff development;
- Promotional materials;
- Technology;
- Delivery trucks and fuel;
- Utilities;
- Garbage removal;
- Printing and reproduction;
- Maintenance contracts and parts; and
- Advertising for bids.

The Food Services Department does not fund salary costs for maintenance staff doing minor repairs or business office personnel who provide payroll, personnel, purchasing, accounts payable, and accounting support.

The review team surveyed SSAISD peer districts and asked them to identify which food service operational expenses they paid from food service funds. **Exhibit 9–3** shows the survey results. With the exception of maintenance costs, Edgewood, Harlandale, and SSAISD allocate funds to many of the same overhead costs.

Food service profits can only be used for food service operations according to federal regulations. When expenses that are used to generate food service revenue, such as business support services,

EXHIBIT 9–3
SSAISD PEER DISTRICT OVERHEAD COST COMPARISONS
2003–04

TYPE OF EXPENDITURE COVERED BY FOOD SERVICE BUDGET	SOUTH SAN ANTONIO	EDGEWOOD	HARLANDALE	ROMA	MERCEDES
Water/Wastewater	X	X	X	X	
Gas/Utilities	X	X	X	X	
Custodial Support	X	X	X	X	X
Trash/Waste Removal	X	X	X	X	
Maintenance (district staff)		X	X		
Maintenance (service contracts)	X	X	X		X
Promotional Items/Advertising	X	X	X		X

SOURCE: SSAISD, Peer district surveys, May 2004.

are not allocated to the food services operations, the general fund is used to pay for these costs. This results in fewer funds available for instructional use.

Effective school districts evaluate all costs contributing to food service operations and allocate available fund balance to cover these costs. For salaries and materials, the districts use allocation methodologies that are supported by an analysis of actual time and materials or on a pro-rata basis, such as square footage for utilities.

The director of Food Services should meet with the executive director for Business and Finance Services to analyze support provided and document a cost allocation methodology. The analysis should reflect the staff, supervisory time, and materials spent for payroll, personnel, accounting, and purchasing functions. The Food Services Department should absorb these costs, and review and update the support methodology annually.

The Food Services Department receives an estimated equivalent of 0.5 in clerical support for payroll, purchasing, and accounts payable and receives the equivalent of 0.01 of executive director time and 0.05 of accountant time. The average actual salaries for each group include the following: $31,127 for clerical support, $67,973 for executive director support and $55,406 for accounting support. Using the pro-rated allocation, the total salary cost is $19,014 [(0.5 x $31,127 = $15,564) + (0.01 x $67,973 = 680) + (0.05 x $55,406 = $2,770)]. The total fringe benefit cost is 10.4 percent of salaries, or $1,978 ($19,014 x 0.104 = $1,978). The total annual salary plus fringe benefits cost is $20,992 ($19,014 + $1,978 = $20,992). Funds should be retroactively transferred starting 2004-05.

FOOD SERVICE EMPLOYEE HANDBOOK (REC. 76)

SSAISD does not have an employee handbook that is translated into Spanish or up to date. SSAISD's Food Services Department handbook was last updated in 2000–01. It contains the department's mission goals and objectives, employee job responsibilities, and policies on a wide range of topics from personal appearance and conduct to

evaluations and procedures for reporting accidents if an injury occurs. It also outlines general duties and food reimbursement requirements for school breakfasts and lunches. To promote accountability, the handbook also includes an acknowledgement form that employees are to sign that certifies that they have read and understood the material.

The handbook does not contain a Spanish translation. A significant number of SSAISD's food service workers speak limited English. Several cafeteria managers interviewed suggested that translated materials would be helpful to their staff.

Since the handbook is not translated, food service employees with limited English skills may have difficulty understanding all policies and procedures. Without an updated handbook, the Food Services Department may be communicating incorrect and inaccurate information.

Galena Park ISD's Student Nutrition Services Department employee handbook contains Spanish translations of key policies and procedures and communicates department information and employee performance expectations to both English and Spanish speaking staff. The bilingual handbook is reviewed annually with employees during employee in-service training.

The director of Food Services should work with Food Services Department central office staff that are bilingual, such as the food service supervisor and clerk, to update and translate the written handbook. The executive director for Human Resources and Student Services should review the handbook to ensure that personnel-related information is accurate and up to date. In addition to updating the written handbook, the director of Food Services should work with Food Services Department and Career and Technology Education staff to develop a recorded version of the handbook as a training aid. Once the handbook has been updated, the director of Food Services should assign responsibility to staff and identify a schedule for annually reviewing and updating the handbook to ensure that it remains current.

MANAGER TRAINEES (REC. 77)

SSAISD does not have an incentive program for its manager trainees. The manager trainee program has been in place since 1999. There were six manager trainees in 2003–04. Manager trainees are selected based on a letter of recommendation from a manager. There is no job description for this position and no specified training or certification requirements. In addition to normal meal preparation and serving duties, the manager trainees perform manager duties such as completing production sheets, using the computer POS system to generate reports, preparing daily deposits, and ordering commodities and supplies. The director of Food Services said that manager trainees are not compensated for these extra duties.

An incentive program tied to job duties, training, and certification encourages staff to become manager trainees, assume additional duties, and obtain additional training and certification. Manager trainees maintain productivity and continuity in food service operations because trained, experienced staff is available to fill in when managers are absent due to vacation or illness. They also provide a pool of trained and readily available staff that can be promoted quickly to fill vacant manager positions. This will become increasingly important to SSAISD long-term since one third of its managers have more than 20 years' experience and may begin to qualify for retirement.

Galena Park ISD's Manager Trainee Program provides a pool of trained individuals to fill vacancies and cover manager absences. To be eligible, staff must have a level two food service certification and be pursuing a level three certification. They must apply to be accepted as a manager trainee. Trainees are assigned to elementary and secondary schools and snack bars. They are rotated annually to gain a broader understanding of different types of cafeterias. Trainees learn manager duties such as preparing daily deposits, completing production sheets, ordering groceries and supplies, and using the computer POS system to generate reports. Ten of the 21 managers in 2002–03 began as manager trainees.

The director of Food Services should work with the executive director for Human Resources and Student Services to develop an incentive program. The incentive program should have defined job descriptions with eligibility requirements such as a certain level of food service certification. Employees should be selected for the program based on exemplary past job performance as well as meeting the eligibility requirements.

The annual cost of implementing this recommendation is $3,153. The fiscal impact is calculated assuming that the district will provide a $0.30 hourly increase. The daily total manager trainee hours is 43, and the number of days worked is 191. The salary increase is $2,464 ($0.30 x 43 hours a day x 191 days =$2,464). Fringe benefits of 27.95 percent will cost $689 ($2,464 x .2795 = $689) for a total of $3,153 ($2,464+$689 = $3,153).

For background information on Food Services, see page 171 in the General Information section of the Appendices.

FISCAL IMPACT

The following fiscal impact tables are separated to reflect recommendations' corresponding effects on SSAISD's General Fund and Child Nutrition Fund.

GENERAL FUND

RECOMMENDATION	2004–05	2005–06	2006–07	2007–08	2008–09	FIVE-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
75. Allocate funding to cover costs for business support provided to the Food Services Department.	$20,992	$20,992	$20,992	$20,992	$20,992	$104,960	$0
Total	$20,992	$20,992	$20,992	$20,992	$20,992	$104,960	$0

CHILD NUTRITION FUND

RECOMMENDATION	2004–05	2005–06	2006–07	2007–08	2008–09	FIVE-YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
72. Implement a process to prevent excess fund balance for the Food Services Department.	$0	$0	$0	$0	$0	$0	$0
73. Increase the salaries for food service workers to be competitive with surrounding districts.	($102,716)*	($102,716)*	($102,716)*	($102,716)*	($102,716)*	($513,580)*	$0
74. Eliminate the two partially–funded clerical positions.	$17,291*	$17,291*	$17,291*	$17,291*	$17,291*	$86,455*	$0
75. Allocate funding to cover costs for business support provided to the Food Services Department.	($20,992)*	($20,992)*	($20,992)*	($20,992)*	($20,992)*	($104,960)*	$0
76. Translate the Food Services Department handbook into Spanish and update on an annual basis.	$0	$0	$0	$0	$0	$0	$0
77. Implement an incentive program for manager trainees.	($3,153)*	($3,153)*	($3,153)*	($3,153)*	($3,153)*	($15,765)*	$0
Total	($109,570)*	($109,570)*	($109,570)*	($109,570)*	$109,570)*	($547,850)*	$0

NOTE*: Denotes (Costs)/Savings that can be paid from existing Food Services Department fund balance.

CHAPTER 10
STUDENT TRANSPORTATION

The Transportation Department serves an average of 2,471 daily riders, or 25 percent, of South San Antonio Independent School District's (SSAISD) student enrollment on 12 regular and nine special program routes. The district uses 26 of its 29 total buses and employs 27 part-time and full-time driver positions and nine bus aide positions for its regular and special program routes. The Life Skills and Parenting programs operate three of the district's 29 buses. The district operates on a staggered bell system, allowing the Transportation Department to schedule regular program routes with three trips each morning and afternoon: one for elementary school, one for middle school, and one for high school students. The Transportation Department also maintains the district's vehicles; small engines, such as lawn mowers; and heavy equipment, such as tractors. The director of Special Projects/Bond/ Transportation/Warehouse, hereinafter referred to as the director of Plant Operations for simplicity, manages the Transportation Department as one of his responsibilities.

FINDINGS

- The Transportation Department does not have a day-to day manager to adequately manage operations, supervise drivers and mechanics, and implement performance measures.

- The Transportation Department manually maintains minimal vehicle maintenance records and does not use technology to perform any functional cost or trend analysis, to track associated labor hours, or to evaluate departmental programs against key success factors.

- According to industry standards, SSAISD has more mechanic positions than needed to maintain its transportation fleet and does not fully conduct a preventive maintenance program.

- The Transportation Department does not conduct regular reviews of school bus routes.

RECOMMENDATIONS

- **Recommendation 78 (p. 142): Create a Transportation supervisory position and implement a performance evaluation program.** The district should create this position to manage day-to-day operations, provide driver and mechanic supervision and support, and identify departmental goals and objectives to implement a performance evaluation program. Through this implementation, the district should be able to

improve the efficiency and cost-effectiveness of services provided while reducing the number of operational areas currently assigned to the director of Plant Operations.

- **Recommendation 79 (p. 143): Purchase and implement a vehicle maintenance information system (VMIS) and conduct a feasibility study to outsource the vehicle maintenance function.** The district should ensure that all vehicle maintenance records are maintained on the VMIS and use the reporting applications to obtain data for analysis and cost-effectiveness comparisons regarding outsourcing the maintenance function. The district should review internal vehicle maintenance function analysis as well as information obtained from requests for proposals and industry research, to help district administration and the board make an informed decision regarding outsourcing and to provide efficient and cost-effective services districtwide.

- **Recommendation 80 (p. 144): Eliminate the mechanic helper element of the driver/ mechanic helper positions and implement a preventive maintenance program.** The director of Plant Operations should immediately customize a preventive maintenance (PM) program after obtaining and reviewing samples from local districts and the city of San Antonio resulting in departmental efficiencies proactively helping the district increase the life expectancy of transportation vehicles. The administrator for School Support Services and the executive director of Human Resources and Student Services should work together to obtain approval from the board to eliminate the two four-hour mechanic helper elements from the two driver/mechanic helper positions and reclassify them to part-time driver positions.

- **Recommendation 81 (p. 146): Contract with an outside agency to plan district routes and schedules.** The director of Plant Operations should obtain and review any available reports, particularly for districts of similar size and with similar numbers of routes, from outside agencies prior to making any contract recommendations for review by the superintendent and board. Given the stability of the district's student population, the district should contract for route analysis and assistance with schedule development at least every three years to ensure Transportation Department routing efficiency and associated cost-effectiveness.

DETAILED FINDINGS

TRANSPORTATION DEPARTMENT MANAGEMENT, SUPERVISION, AND PERFORMANCE (REC. 78)

The Transportation Department does not have a position to provide adequate management of daily operations, supervision for drivers and mechanics, and implementation of identified goals and performance measures. The director of Plant Operations manages the Transportation Department, the Maintenance Department, the district's warehouse, and special projects, including bond-related construction and renovation, with the assistance of four supervisors in all areas except transportation (**Exhibit 10–1**). As a result, all Transportation Department employees—a secretary, three full-time mechanics, 27 drivers, and nine bus aides—report directly to the director of Plant Operations.

There are a large number of responsibilities assigned to the director of Plant Operations' job description. The director of Plant Operations estimated that he spends 40 percent of his time on Transportation operations, 50 percent on Maintenance operations, and 10 percent on Warehouse operations. As a result, the district does not have a mission statement, goals, objectives, or identified performance measures for the Transportation Department. There are no training manuals or written curriculum for safety and training. Field supervision consists of casual dispatching and riding with drivers in the event of a complaint or problem. A systematic methodology for supervising drivers in the field does not exist. The district does not have a preventive maintenance program.

During interviews and focus group meetings, vehicle users commented that the overall quality of vehicle maintenance is poor. In addition, staff regularly makes vehicle repairs but does not analyze associated parts to identify frequently used parts and efficient and cost-effective ways to obtain them.

Exhibit 10–2 shows some standard transportation performance indicators and the associated SSAISD performance statistic for each performance indicator.

The district previously had a Transportation Department supervisory position but eliminated it in 2001 during budget reductions.

Many districts use supervisors or assistants to reduce a director's immediate span of control and assist with important departmental operations, including development of goals, objectives, and performance measures. They identify a mission statement to define a departmental purpose and serve as the starting point for developing related goals and objectives. They ensure goals or general statements of accomplishments and objectives, or the quantitative results used to evaluate performance and progress towards goals, match the mission statement and departmental purpose.

Many public transit agencies and private fleet managers then use performance evaluation to measure improvements in cost-efficiency, cost-effectiveness, and service-effectiveness. They use obtained data to determine employee training requirements; improve or initiate preventive maintenance programs; reduce repeat failures, road calls, and unscheduled maintenance; improve employee and customer satisfaction; and reduce overall costs. These organizations have adequate managerial staff to help staff meet identified goals and objectives and recognize achievements and areas of need.

The district should create a position to manage day-to-day operations, provide driver and mechanic supervision and support, and identify departmental goals and objectives to implement a performance evaluation program.

EXHIBIT 10–1
TRANSPORTATION ORGANIZATION
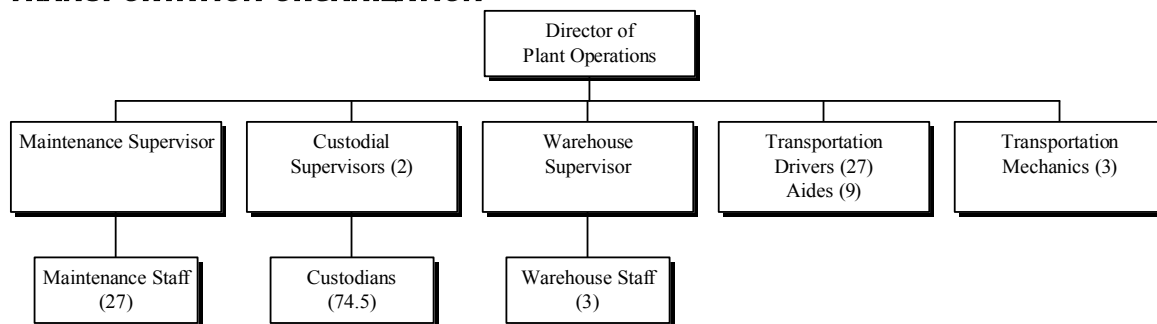
SOURCE: SSAISD, School Support Services Organization Chart, 2003–04.

EXHIBIT 10–2
TRANSPORTATION PERFORMANCE INDICATORS AND
SSAISD PERFORMANCE STATISTICS

PERFORMANCE INDICATOR	SSAISD 2002–03 ACTUAL
Safety	
Accidents or incidents per 100,000 miles	Not Tracked
Student referrals per 1,000 students bused	Not Tracked
Annual hours of training for each driver	Not Tracked
Cost–Efficiency	
Operations cost per mile – Regular	$3.18
Operations cost per mile – Special	$2.20
Cost–Effectiveness	
Operations cost per rider – Regular	$1.19
Operations cost per rider – Special	$7.56
Service Effectiveness	
Route riders per mile – Regular	3.07
Route riders per mile – Special	0.36
Route riders per bus – Regular	117
Route riders per bus – Special	17
Service Quality	
On–time performance	Not Tracked
Complaints per 100,000 miles	Not Tracked
Maintenance Performance	
Miles between road calls or breakdowns	Not Tracked
Percent preventive maintenance inspections completed on–time	Not Tracked
Turnover time per bus repair	Not Tracked

SOURCE: Texas Education Agency, School Transportation Operation Report and School Transportation Route Services Report, 2002–03.
NOTE: Operations cost excludes capital outlay and debt service.

By establishing a supervisory position to manage day-to-day Transportation operations and departmental staff and implementing a performance monitoring program, the district should be able to improve the efficiency and cost-effectiveness of services provided while reducing the number of operational areas currently assigned to the director of Plant Operations. The director of Plant Operations should work with the executive director of Human Resources and Student Services to develop a detailed job description, including such duties as field observations, driver training, accident investigation, dealing with complaints from parents or schools, monitoring drivers in the field, conducting annual performance reviews of drivers and mechanics, investigating hazardous areas and the safety of bus stops, and assigning repair work orders and tracking their progress. In addition, the superintendent should establish a task force to develop performance measures for the Transportation Department minimally including the director of Plant Operations, a bus driver, a mechanic, a parent, and a representative from the Human Resources and Business and Finances Departments.

The fiscal impact for this recommendation is based upon the salary and benefits for a new Transportation Department supervisor. The custodial, maintenance, and warehouse supervisor positions are classified as job grade 7. The midpoint for this job grade is $16.16 per hour, with fringe benefits of 27.95 percent. Using these calculations,

the annual salary and benefits estimate for a Transportation supervisor is $43,008 ($16.16 x 8 hours per day x 260 days a year x 1.2795 benefits rate). The 2004–05 estimate is recognized at one-half the annual rate, or $21,504 including benefits, for implementation in January 2005. Total five-year costs are estimated at $193,536 [$21,504 + $43,008 x 4)].

VEHICLE MAINTENANCE AND RECORDS MANAGEMENT (REC. 79)

The Transportation Department manually maintains minimal vehicle maintenance records and does not use technology to perform any functional cost or trend analysis, to track associated labor hours, or to evaluate departmental programs against key success factors.

The district manually keeps a folder containing work orders for each bus and vehicle maintained and a listing of the work performed and parts used following breakdowns or oil and lube changes. Drivers also record daily mileage counts in a logbook for Texas Education Agency (TEA) reporting purposes, and the fuel vendor provides the weekly number of gallons of fuel used per vehicle as part of the billing process. None of this information, however, is interrelated, accessible electronically, or compiled in a report fashion to assess overall performance of the function when compared to key success factors (**Exhibit 10–3**).

EXHIBIT 10–3
COMPARISON OF SSAISD TRANSPORTATION SERVICES TO VEHICLE MAINTENANCE
KEY SUCCESS FACTORS

SUCCESS FACTOR	STATUS
Preventive Maintenance	The Transportation Department does not have a preventive maintenance program in place.
Parts Management	The Transportation Department does not maintain a parts inventory.
Vehicle Maintenance Information System (VMIS)	The Transportation Department does not use an automated VMIS to track repairs and maintenance costs. The cost of supplies and materials has increased 57 percent from 1998–99 to 2002–03.
Customer Service	Buses and general service vehicles are considered to be in poor repair by the users.

SOURCE: SDSM, June 2004.

The Transportation director said mechanics generally change the oil and lubricate buses on a monthly basis. During a focus group, however, drivers said they were dissatisfied with the quality of bus maintenance, as evidenced by frequent breakdowns. Interviews with SSAISD Police Department staff also revealed dissatisfaction with the quality of vehicle maintenance provided by the Transportation Department. In addition, no data is kept on part orders to measure the length of time needed to repair buses and vehicles or to compare the cost of supplies and materials for a particular vehicle, department, or as an overall districtwide function on an annual basis. Upon review, the cost of supplies and materials increased 57 percent from 1998–99 to 2002–03.

When service quality and key success factors are not met, many districts conduct a feasibility study to consider possible outsourcing. This includes a review of available records, comparisons to industry standards, and a review of any related research. In addition, many districts use VMIS to inexpensively track and monitor records for both internal and external comparisons. Additionally, an RFP is another way to incorporate local rates and services into decisions about privatizing a portion of departmental operations. While privatization or outsourcing does not always result in savings, the benefit of privatization is realized in improved quality of vehicle maintenance.

The district should purchase, install, and implement a VMIS and conduct a feasibility study. The director of Plant Operations should work with the director of Technology and the director of Purchasing to immediately identify necessary specifications for this software purchase. The district should then maintain all vehicle maintenance records on the automated system including tracking and monitoring labor hours, length of time required for repairs, parts used, and all associated variables. The district should also ensure that the appropriate personnel receive appropriate VMIS training.

The executive director of Student Services, the director of Plant Operations, and the director of Purchasing should collaboratively conduct research on industry standards and analyze available data as part of a feasibility study. They should use internally analyzed data collected from the VMIS reporting structure to compare district results to industry, local, and comparably-sized districts and identify any pertinent trends in the departmental program elements. The district should also include research-based elements when developing and reviewing responses to an RFP to outsource the maintenance function of the Transportation Department's operations. In addition, the directors should present the feasibility study results to the executive director for Business and Finance Services and the superintendent for review and approval.

The Calvert Institute for Policy Research recommends avoiding employing those individuals who formerly managed an in-house operation as contract managers. As such, the district should designate the director for School Support Services as the district's contract manager to avoid the appearance of bias and conflict of interest, should the district decide to outsource vehicle maintenance. Resulting contracts should specify at least four core factors: range and variety of maintenance, time schedule of maintenance, cost estimations, and criteria for monitoring quality of service. The initial cost for VMIS software is estimated at a single investment of $500.

MECHANIC STAFFING AND PREVENTIVE MAINTENANCE (REC. 80)

The Transportation Department has more mechanics than it needs to maintain the transportation fleet, yet does not have a preventive maintenance program. The Transportation Department assigns four full-time-equivalent positions as mechanics—three full-time mechanic positions and two part-time driver/mechanic helper positions—that each

dedicate four hours a day to mechanics. Based on an April 2004 fleet list from the district, the Transportation Department maintains 29 school buses and 59 vehicles and small-engine machines in the general services fleet. The district includes tractors, lawn mowers, and vehicles used primarily for parts and not for transportation purposes in its general services fleet list. The buses have average annual mileage of 10,952, and the general services fleet has average annual mileage of 8,211.

To estimate actual mechanic labor hours worked, each mechanic is credited with seven hours of productive time for mechanical duties per day, with one hour deducted for breaks, cleaning the shop, and performing other non-maintenance duties. Based on absentee records, each mechanic is estimated to miss 13 days of work each 260-day year for sick time and vacation days. Using these assumptions, the review team estimated each mechanic full-time equivalent is available to perform productive maintenance work approximately 1,729 hours per year ([260 days – 13 absent days] x 7 hours per day). Although one of the mechanic helpers is listed as working 240 days, 260 days is conservatively used in these calculations. Four full-time equivalent mechanics, therefore, provide 6,916 annual hours of productive maintenance work

The review team conservatively estimated the annual number of hours required to maintain each vehicle based on tasks included in a comprehensive preventive maintenance program. The estimated amount of time needed to perform each inspection is based upon data presented in the *Vehicle Maintenance Coordination Study* for the Coastal Bend Regional Transportation Steering Committee. **Exhibit 10–4** outlines the hourly assumptions for each type of inspection per vehicle, the average number of each type of inspection conducted each year per vehicle, and the average total annual inspection hours

conducted per vehicle.

Based on average annual miles driven and according to industry standards, buses are inspected six or seven times per year, requiring an average of 55 hours of maintenance annually. General service vehicles are inspected four or five times per year according to these same standards, which requires an average of 22 hours of maintenance annually. Districts use these standards in staffing decisions and often increase hourly figures by 50 percent as an allowance for repairs and unscheduled maintenance.

Each of the district's 29 school buses is estimated to require 83 hours of maintenance annually, for a total of 2,392 hours (55 inspection hours x 1.5 unscheduled maintenance factor x 29 buses). Each of the 59 vehicles requires 32 hours of maintenance annually, for a total of 1,859 hours (21 inspection hours x 1.5 unscheduled maintenance factor x 59 vehicles). Together, the buses and vehicles require 4,251 annual hours of maintenance.

Altogether, the mechanics work 6,916 hours of maintenance labor per year without a preventive maintenance program for a fleet that should only require about 4,251 hours of maintenance per year including preventive maintenance tasks, or 2,665 more hours than required. At a rate of 1,729 hours per full-time equivalent mechanic, this analysis shows that the maintenance function of the Transportation Department has one more full-time equivalent mechanic than necessary.

The district should eliminate the mechanic helper element of the driver/mechanic helper positions. The director of Plant Operations should also develop a preventive maintenance (PM) program minimally including annual bus and vehicle inspections and two additional scheduled PM inspections—one at 3,000 miles and one at 6,000 miles—and immediately

EXHIBIT 10–4
AVERAGE ANNUAL INSPECTIONS AND INSPECTION HOURS
PER BUS/VEHICLE CALCULATIONS

INSPECTION TYPE	HOURS TO COMPLETE PER BUS/VEHICLE	NUMBER PER YEAR PER BUS/VEHICLE	TOTAL ANNUAL HOURS PER BUS/VEHICLE*
SCHOOL BUSES (10,952 AVERAGE ANNUAL MILEAGE)			
3,000 mile inspection	2	3.7	8
6,000 mile inspection	4	1.8	7
Annual	40	1.0	40
Total Inspection Hours per School Bus	N/A	6.5	55
OTHER VEHICLES (8,211 AVERAGE ANNUAL MILEAGE)			
3,000 mile inspection	2	2.7	5
Annual	16	1.0	16
Total Inspection Hours per Other Vehicle	N/A	3.7	21

SOURCE: SSAISD, Transportation Department, Fleet Inventory, April 2004 and the Coastal Bend Regional Transportation Steering Committee, Vehicle Maintenance Coordination Study.
*Some variance in numbers due to rounding.

schedule mechanics according to the schedules. The director of Plant Operations should contact local districts and the City of San Antonio to solicit samples of preventive maintenance programs for buses and vehicles to further customize one for the district. Since PM schedules are based on mileage, the director of Plant Operations should review bus mileage weekly, which is already manually recorded by bus drivers, to determine the weekly preventive maintenance schedule. The director of Plant Operations should schedule general service vehicles for PM–A maintenance every three to four months, depending on usage, and ensure all buses and vehicles receive an immediate baseline inspection to help prioritize vehicles for inclusion on the schedule.

Reducing the two full-time driver/mechanic helper positions to two part-time drivers or eliminating the mechanic helper portion of the positions should save the district $35,113 annually. To be conservative in savings calculations, the 240-day estimates are used rather than 260 workdays per year. The two driver/mechanic helpers earn $56,748 per year ($11.55 per hour x 1.2795 in benefits x 8 hours a day x 240 days per year x 2 driver/mechanic helper positions). The cost of two part-time drivers that receive benefits, however, is $21,635 ($11.55 x 1.2795 in benefits x 4 hours per day x 183 days per instructional year x 2 drivers). The district annually saves $35,113 through this reduction ($56,748 cost of two full-time driver/mechanic helpers – $21,635 cost of two part-time drivers). During 2004–05, however, savings are pro-rated to $17,557 based on 120 days, or one-half of the estimated annual savings. The director of Plant Operations should work with the executive director of Human Resources and Student Services to update associated job descriptions and present all recommended changes to the superintendent and board for approval.

SCHOOL BUS ROUTING (REC. 81)

The Transportation Department does not periodically conduct comprehensive reviews of school bus routes to identify savings and ensure efficiency. The Transportation director and Transportation clerk said routes change little from year to year. Routes have not been reviewed in more than 10 years. The director of Plant Operations modifies routes if he or the clerk becomes aware of student moves. There is no systemic review of routes on a regular basis to identify savings. Also, while transportation cost increases are considered during the evaluation of school boundary changes, potential savings in transportation costs may not receive the same consideration.

SSAISD operates 21 routes at an estimated cost of $16,462 per route. This cost estimate is based on three factors: the average annual number of route miles operated per route, the average maintenance cost per mile, and the average driver cost per route. Based on the 2002–03 TEA School Transportation Operation Report, SSAISD operates an average of 256,292 deadhead route miles—which is time that the bus runs without students—per year, or 12,204 annual miles per route for 21 routes.

The estimated average maintenance cost per mile was determined using TEA operations cost data from the 2002–03 School Transportation Operation Report, as shown in **Exhibit 10–5**. Salaries and benefits were subtracted from annual operation costs, then divided by the total number of route miles with deadhead operated per year. The annual operating cost of $817,578 minus $635,596 in salaries and benefits equals $181,982. Dividing $181,982 by 256,292 route miles results in an average maintenance cost per mile of $.71. This methodology assumes that outside of salaries and benefits, most of the expenses in a district Transportation Department can be attributed to maintenance.

The average driver wage is $10.83 per hour. Each driver works on his or her route a minimum of four hours per day, or 720 hours per year.

Many districts review routes on a regular basis to identify potential cost savings. School boundary changes can also result in transportation savings and/or cost increases that these districts identify through regular route reviews. A systemic review of transportation routes provides meaningful information for many of these district decision makers. Sometimes districts reduce the costs of performing this type of review by using outside agencies such as other school districts or local governments to perform the routing analysis using their software and skills.

The Round Rock ISD (RRISD) Transportation

EXHIBIT 10–5
ESTIMATED AVERAGE ANNUAL COST PER ROUTE SSAISD
2002–03

COST DRIVERS		COST UNIT	TOTAL COST
Miles per Route	12,204	$0.71 per mile	$8,664
Hours per Route	720	$10.83 per hour	$7,798
		Total	$16,462

SOURCE: Texas Education Agency, School Transportation Operations Report, 2002–03.

Department performs routing and scheduling for 25 districts in Texas at a cost of $100 per bus for the service. The RRISD Transportation director generally identifies a 5 percent savings in any district for which he provides routing and scheduling services. In one recent study, the routing analysis identified routes that would reduce the number of regular buses from 24 to 16, a 33 percent reduction.

The district should contract for a routing analysis for 2005–06 after the director of Plant Operations and the director of Purchasing obtain and review reports from several agencies or entities that have conducted routing analyses for districts of a similar size and with similar numbers of buses. In addition, the director of Purchasing should oversee development and continued monitoring of the contract for routing analysis.

This fiscal impact assumes the district can eliminate one route, for a savings of $16,462 annually. These savings are offset in the first implementation year by an estimated cost of $2,100 to perform the routing analysis ($100 per bus route x 21 routes) and by $2,000 in the third year ($100 per bus route x 20 routes) resulting in five-year savings of $78,210. The overall reduction of $100 for route analysis during the third year takes into account the reduction of total routes from 21 to 20.

For background information on Student Transportation, see page 173 in the General Information section of the Appendices.

FISCAL IMPACT

RECOMMENDATION	2004–05	2005–06	2006–07	2007–08	2008–09	FIVE–YEAR (COSTS) OR SAVINGS	ONE-TIME (COSTS) OR SAVINGS
78. Create a Transportation Department supervisory position and implement a performance monitoring program.	($21,504)	($43,008)	($43,008)	($43,008)	($43,008)	($193,536)	$0
79. Purchase and implement a vehicle maintenance information system (VMIS) and conduct a feasibility study to outsource the vehicle maintenance function.	$0	$0	$0	$0	$0	$0	($500)
80. Eliminate the mechanic helper element of the driver/ mechanic helper positions and implement a preventive maintenance program.	$17,557	$35,113	$35,113	$35,113	$35,113	$158,009	$0
81. Contract with an outside agency to plan district routes and schedules.	$14,362	$16,462	$16,462	$14,462	$16,462	$78,210	$0
Total	$10,415	$8,567	$8,567	$6,567	$8,567	$42,683	($500)

GENERAL INFORMATION

CHAPTER ONE
EDUCATIONAL SERVICE DELIVERY

The Texas Education Agency (TEA) provides information on the Texas Assessment of Knowledge and Skills (TAKS); the Texas Association of Academic Skills (TAAS); and other demographic, staffing, and financial data to school districts and the public through the Academic Excellence Indicator System (AEIS) and the Public Education Information Management System (PEIMS). This chapter uses data from both systems.

The South San Antonio Independent School District (SSAISD) selected four Texas school districts to serve as peer districts for comparison purposes: Edgewood, Harlandale, Mercedes, and Roma. Compared to the state and the Regional Education Service Center XX (Region 20), all have a lower percentage of African American, Anglo, and Other (Asian/Pacific Islanders and Native American) students and a higher percentage of Hispanic and economically disadvantaged students **(Exhibit A–1)**.

In 1993, the Texas Legislature enacted legislation mandating the creation of an accountability system to rate the state's school districts and evaluate district schools. Data were gathered through PEIMS, a student-level information system, and TAAS, a student assessment system that tested knowledge on the state curriculum, the Texas Essential Knowledge and Skills (TEKS). The data collected are reported through AEIS that serves as the basis for all accountability ratings and reports.

For 2003–04, the most current year for which accountability ratings are available, school districts were assigned one of four standard ratings— *exemplary, recognized, academically acceptable*, or *academically unacceptable*—or one of three special circumstances ratings—*academically unacceptable* (special accreditation investigation), *suspended* (data inquiry), or *charter*. Each school in the district was assigned one of four standard ratings—*exemplary, recognized, acceptable*, or *low performing* or one of three special circumstances ratings—*not rated, alternative education* (commended, acceptable, needs peer review, or not rated), or *suspended* (data inquiry).

For 1997–98 and 2001–02, SSAISD was rated *academically acceptable*. During the intervening three years, 1998–99, 1999–2000, and 2000–01, the district received an accountability rating of *recognized*. During that five-year period, the number of SSAISD schools receiving an *exemplary* or *recognized* rating improved from three schools (17.7 percent) in 1997–98 to 11 schools (68.8 percent) in 2001–02. No SSAISD school received a rating of *low performing* during that five-year period **(Exhibit A–2)**. The same exhibit

also contains the latest 2003–04 accountability ratings assigned using TAKS instead of the TAAS.

Student performance determines, in part, district and school accountability ratings. Although the state intends that every student in a Texas public school enrolled in grades 3 through 11 have an opportunity to take the TAKS or the State Developed Alternative Assessment (SDAA) in grades 3 through 8, not every student's performance is used in determining school and district accountability ratings. Under certain circumstances, some students may not be tested or their performance may not be reported. The reasons for a student's non-participation include:

- The student was not enrolled in the district by the last Friday in the previous October. These students are referred to as the "mobile subset."

- The student is absent during test administration.

- The student is served in special education and takes the SDAA in grades 3–8.

- The student receives an ARD exemption for the tests.

- The student receives a Limited English Proficient (LEP) exemption for the tests.

- The test is not scored due to a student's illness or other test administration irregularities.

During 2002–03, 94.2 percent of all SSAISD students were tested using the TAKS or SDAA. However, the performance of only 83.3 percent of SSAISD students tested counted toward the district's or individual school's ratings. Of those tested, 11.0 percent did not contribute to the ratings—5.5 percent because the students were not enrolled in the district by the last Friday of the previous October and 5.5 percent because the students were tested using the SDAA. Of the 5.8 percent not tested, 1.5 percent was due to Limited English Proficient (LEP), 2.7 percent to Admissions, Review and Dismissal (ARD) exemptions, and 1.6 percent to absences or other reasons.

The percentage of SSAISD students who were tested and whose performance counted toward the accountability rating was the third highest among peer districts but slightly lower that the percentage in Region 20 and the state. Likewise, SSAISD students who were tested but whose performance did not count toward the accountability rating because they did not take the test by the last Friday in October was tied for the highest among peer districts but lower than that in Region 20 and the state. The percentage of students who took the SDAA in SSAISD was third highest among peer districts and also higher than the percentage in Region 20 and the

state. The percentage of SSAISD students not tested was third highest among peer districts and higher than the percentage in Region 20 and the state **(Exhibit A–3)**.

Beginning in 2003–04, the accountability rating system will be based on TAKS results and longitudinal completion rates rather than TAAS results and annual dropout rates. The annual dropout rate used prior to 2003–04 is the percentage of students in grades 7 through 12 who leave school during a school year for reasons other than graduation, receipt of a general equivalency diploma (GED), death, or continuance of an education elsewhere. The longitudinal completion rate is the percent of students entering grade 9 who, four years later, graduated, earned a GED, or are still enrolled at the time the class graduates. AEIS provides data for districts on both the annual dropout rate and the longitudinal completion rate.

The percentage of students who graduated from high school increased between 1999 and 2002 from 79.5 percent to 82.8 percent statewide and from 76.5 percent to 80.2 percent for Region 20. For SSAISD students, however, the percentage declined from 76.5 percent in 1999 to 71.6 percent in 2002. During that same period, the percentage of students graduating from South San Antonio High School declined from 77.2 percent to 75.4 percent. The percentage of students graduating from South San Antonio High School West declined even more, from 88.8 percent to 81.2 percent.

Between 1999 and 2002, the percentage of students receiving a GED or continuing their high school education remained fairly constant at the state and Region 20 levels. In 1999, that percentage was 12.0 for the state and 13.3 for Region 20. In 2002, the percentages were 12.1 for the state and 13.7 for Region 20. In SSAISD, the percentage increased from 8.5 percent to 19.8 percent and from 5.9 percent to 13.8 percent and 3.7 percent to 17.4 percent at South San Antonio High School and South San Antonio High School West, respectively.

The longitudinal dropout rate, the percent of students not graduating, earning a GED, or continuing their education, declined between 1999 and 2002 for the state, Region 20, SSAISD, and both district high schools. The longitudinal dropout rate declined from 8.5 percent to 5.0 percent statewide, from 19.2 percent to 6.2 percent in Region 20, and from15.1 percent to 8.6 percent in SSAISD. Although the percentage of SSAISD students graduating declined between 1999 and 2002, the combination of graduates, students receiving a GED and those continuing their high school education increased during that period resulting in a lower

dropout rate districtwide as well as in each high school individually **(Exhibit A–4)**.

The percent of SSAISD students in the class of 2002 that graduated was the second lowest among peer districts and lower that the percentage in Region 20 and the state. The percent of SSAISD students in the class of 2002 that dropped out over a four-year period was the third highest among peer districts and higher than the percent in Region 20 and the state **(Exhibit A–5)**.

As indicated by **Exhibit A–6**, the percent of Hispanic graduates and dropouts closely approximates the percent of graduates and dropouts for all students in all of the districts due to the high proportion of Hispanic students in the total enrollment. The percent of Anglo, economically disadvantaged, and at-risk graduates in the class of 2002 was lower in SSAISD than in any of the other peer districts. Among peer districts, the percent of SSAISD dropouts was highest for at-risk students, second highest for Anglo students, and third highest for Hispanic and economically disadvantaged students.

STUDENT PERFORMANCE

Prior to 2002–03, the TAAS was used to measure student performance. Districts administered TAAS in reading and mathematics in grades 3 through 8 and grade 10; in reading and mathematics in Spanish in grades 3 and 4; in writing in grades 4, 8, and 10; and in science and social studies in grade 8. Districts also administered end-of-course (EOC) examinations in Algebra I, Biology, English II, and U.S. History. To graduate from a high school in Texas, a student had to pass the TAAS exit-level exam administered first in grade 10.

Beginning in 2002–03, the TAKS replaced the TAAS as the statewide assessment program. TAKS is designed to measure to what extent a student has learned, understood, and is able to apply the important concepts and skills expected at each tested grade level on the statewide curriculum, the TEKS. TAKS is administered in reading at grades 3 through 9; in writing at grades 4 and 7; in English Language Arts at grades 10 and 11; in mathematics at grades 3 through 11; in science at grades 5, 10, and 11; and in social studies at grades 8, 10, and 11. The Spanish TAKS is administered in grades 3 through 6. A student must pass the TAKS at grade 11 to receive a high school diploma in Texas.

The State Developed Alternative Assessment (SDAA) is administered to special education students who are receiving instruction in the TEKS but for whom the TAKS is an inappropriate measure of academic progress. Students are assessed at their

appropriate instructional level, as determined by the Admission, Review, and Dismissal (ARD) committee, rather than at their assigned grade level. The SDAA is administered on the same schedule as the TAKS and is part of the state accountability system.

In November 2002, the State Board of Education (SBOE) adopted two performance standards for the TAKS, *met standard* (i.e., passing) and *commended performance* (i.e., high performance). However, because the TAKS is more challenging than the TAAS, the SBOE agreed to a transition plan recommended by panels of more than 350 educators and citizens to phase in *met standard* over several years. The passing standards during the phase-in are expressed as a "standard error of measurement" (SEM). In general, the passing standard is set at two SEM below the panel recommendation for 2002–03 and one SEM below the recommendation for 2003–04. Full implementation of the panel recommendations for *met standard* will occur in 2004–05 with the exception of grade 11 students taking the TAKS exit-level test.

TAAS passing rates for SSAISD students improved between 1999–2000 and 2001–02 on the reading and mathematics sub-tests as well as on all tests combined. The percent of students passing the reading portion of TAAS rose from 85.5 percent to 88.2 percent. In mathematics, the percent of students passing increased from 84.8 percent to 90.1 percent. The percent of students passing all tests increased from 75.7 percent to 80.8 percent. The percent of students passing the writing sub-test declined slightly, from 87.8 percent to 87.0 percent. The passing rates of SSAISD students, however, were lower that those statewide on all sub-tests and all tests combined for all three years except for writing in 2000–01 **(Exhibit A–7)**.

In 2002–03, 55.1 percent of all SSAISD students for all tests in all grades tested met the TAKS transition passing standard of 2 SEM below panel recommendations. This compared to 67.4 percent statewide. This means that almost 45 percent of SSAISD students performed at a level less than that required to reach the 2 SEM passing standard compared to approximately 33 percent statewide. Only 1.8 percent of SSAISD students performed at a commended level compared to 4.7 percent statewide.

Among peer districts, SSAISD had the second highest percentage of students passing all tests, 57.3 percent. That percentage, however, was lower than that in Region 20, 66.8 percent, and the state, 69.1 percent. On the six TAKS sub-tests, SSAISD students had the highest pass rate among peer districts on science; the second highest pass rate on

reading, math, writing, and social studies; and the lowest pass rate in English language arts. The district's pass rate was lower than the pass rate in Region 20 and the state on all six sub-tests **(Exhibit A–8)**.

Mathematics is the only content area tested in all nine grades. The passing rates of SSAISD students in mathematics ranged from a high of 93.4 percent in grade 3 to a low of 38.0 percent in grade 9. Reading is tested in seven grades, and the passing rates ranged from a high of 88.9 percent in grade 3 to a low of 74.2 percent in grade 9. Science and social studies are each tested in three grades with the high pass rate in science in grade 5 and in social studies in grade 8. The lowest pass rate in both content areas was in grade 10. The highest pass rate for all tests combined was 84.8 percent at grade 3, and the lowest pass rate, 25.3 percent, was at grade 10 **(Exhibit A–9)**.

As indicated previously, the TAKS passing standards changed from 2 SEM below panel recommendations in 2002–03 to 1 SEM below panel recommendations in 2003–04. For 2003–04, the percentage of SSAISD students passing mathematics at the higher standard ranged from a high of 92 percent in grade 3 to a low of 37 percent in grades 8 and 10. The percentage of students passing reading ranged from a high of 89 percent in grade 3 to a low of 71 percent in grade 5. The percentage of students passing science ranged from 66 percent in grade 11 to 43 percent in grade 10, and the percent of students passing social studies ranged from 95 percent in grade 11 to 81 percent in grade 10 **(Exhibit A–10)**.

One method of determining if improvement has occurred in TAKS scores is to compare the percentage of students meeting the passing standard of 1 SEM in 2002–03 and 2003–04. The data for 2003–04 are provided in **Exhibit A–11**, and the data for 2002–03 are provided in **Exhibit A–11**.

A comparison of data in **Exhibit A–10** and **Exhibit A–11** indicates that, of the 26 tests administered in six content areas in grades 3–11, the percentage of SSAISD students meeting the passing standard of 1 SEM improved between 2002–03 and 2003–04 on 22 tests, remained the same on two, and declined on two. More specifically:

- At Grade 3, the percent of students passing mathematics increased from 85 percent to 92 percent. The percent of students passing reading increased from 84 percent to 89 percent.

- At Grade 4, the percent of students passing increased in all subjects tested, from 76 percent to 79 percent in reading, from 77 percent to 80 percent in mathematics, and from 79 percent to 91 percent in writing.

- At Grade 5, the percent of students passing reading remain the same, at 71 percent; the percent of students passing mathematics declined slightly, from 78 percent to 77 percent; and the percent of students passing science increased from 53 percent to 64 percent.

- At Grade 6, the percent of students passing increased on both tests, from 66 percent to 76 percent in reading and from 54 percent to 66 percent in mathematics.

- At Grade 7, the percent of students passing increased on all three tests, from73 percent to 77 percent in reading, from 46 percent to 53 percent in mathematics, and from 82 percent to 92 percent in writing.

- At Grade 8, the percent of students passing reading increased from 74 percent to 79 percent but declined in mathematics, from 40 percent to 37 percent. The percent passing social studies remained at 83 percent.

- At Grade 9, the percent of students passing increased on both tests, from 64 percent to 77 percent in reading, and from 26 percent to 38 percent in mathematics.

- At Grade 10, the percent of students passing increased on all four tests, from 29 percent to 37 percent in mathematics, from 48 percent to 56 percent in English/Language Arts, from 31 percent to 43 percent in science, and from 66 percent to 81 percent in social studies.

- At Grade 11, the percent of students passing increased on all four tests, from 33 percent to 66 percent in mathematics, from 52 percent to 84 percent in English/Language Arts, from 34 percent to 66 percent in science, and from 76 percent to 95 percent in social studies.

SPECIAL EDUCATION

Under the federal Individuals with Disabilities Education Act (IDEA), districts must provide appropriate public education for all children with disabilities. IDEA requires districts to provide educational services in the "least restrictive environment," and to include students with disabilities in state and district assessment programs. Districts are also required to develop an Individual Education Plan (IEP) for each of these students with input from general education teachers. The IEP has to provide special education students with curricula that are related to those of students in general education classrooms.

SSAISD offers the full continuum of instructional arrangements for special education students at its schools.

Mainstream – To ensure the least restrictive environment appropriate for each student, district personnel first consider providing services in general education classrooms with supplementary aids or services. Students with disabilities who spend all of their classroom hours in a regular classroom are called "mainstreamed." SSAISD started implementing an inclusion program in 2003–04 at Dwight Middle School for all core subjects. Under the inclusion program, special education personnel work with the regular classroom teacher to provide academic or behavioral support. The district hired two full-time and one part-time inclusion teachers, provided staff development to all regular education teachers, and purchased computers for the special education students. SSAISD plans to implement inclusion programs in the other middle schools also and then at the high schools. Of the 1,116 special education students at SSAISD in 2003–04, 941, or 84.3 percent, spent at least 50 percent of the day in regular classrooms. Content Mastery is available in all secondary campuses. At the elementary campuses, the resource teachers also provide Content Mastery.

Resource – Resource classes are available for students in special education who need modified curriculum and instruction from a certified special education teacher. Students are assigned to the resource classroom based on the ARD committee's recommendation. SSAISD has resource classes at all schools. The elementary schools use a pullout program for reading and math. Resource classes follow the student's IEP, which is correlated to TEKS, and stays in sequence with the regular classes.

Self-Contained Classes – Students with severe disabilities who cannot be appropriately served in a regular classroom will be served in a separate "self-contained" classroom. The self-contained classrooms, called life skills rooms, assure that the needs of students with severe and profound disabilities are met and that life skills training takes place. The emphasis of the core coursework is on daily application leading toward independent living. Some of the high school students in the life skills program receive community based vocational instruction to prepare them to enter the workforce upon graduation. Self-contained classes are available at five elementary schools, the three middle schools and the two high schools.

Adaptive Physical Education – Students receive physical education instruction in the general education physical education program. The ARD committee addresses modifications for physical education and provides these when needed for the student to be successful. Occupational and physical therapists provide adaptive physical education programs for students who would not benefit from a general

education physical education program without modifications. SSAISD has two adaptive physical education teachers.

Behavioral Units – SSAISD has behavioral units in one elementary school and on all five secondary campuses. SSAISD plans to add another elementary school unit in 2004–05.

Homebound – This program provides at-home services for students at all grade levels who cannot attend school because of illness or injury. SSAISD has a homebound teacher. In 2003–04, the district provided services to five homebound students.

The Preschool Program for Children with Disabilities (PPCD) – SSAISD provides a pre-school program for children with disabilities who are three to five years old at six elementary schools. Kindred Elementary has two units.

The SSAISD Special Education Department is headed by a director and assistant director and includes 16.8 full time equivalent (FTE) assessment personnel, 72 FTE teachers, 76 paraprofessionals, three FTE clerks, and a secretary. The 72 teachers include six teachers in the Regional Day School for the Deaf, two adaptive physical education teachers, a visual impairment teacher and a homebound teacher. SSAISD contracts with Speech Specialists of San Antonio for six therapists to provide services to five schools for 72 hours a week. It also contracts with a full-time counselor, three part-time speech therapists, a psychologist (20 percent), a psychiatrist on an as-needed basis, a visual impairments teacher, and an orientation mobility person. SSAISD houses the Regional Day School for the Deaf on an elementary, middle and high school campus. Because it serves as the fiscal agent, it does not have to pay for SSAISD students who attend the school. Five of SSAISD's teachers attend alternative certification programs; all other special education teachers are certified.

Exhibit A–12 shows the percentage of SSAISD students by disability in 2003–04. Of the 1,116 special education students served, 55.4 percent had learning disabilities, 11.3 percent had speech impairments, and 10.7 percent had emotional disturbances.

SSAISD participates in the School Health and Related Services (SHARS) program and is reimbursed for services. The state's Medicaid program was amended in September 1992, allowing school districts to enroll as Medicaid providers and apply for Medicaid reimbursement for services they are providing to students with disabilities. SHARS provides reimbursement for services determined to be medically necessary and reasonable to ensure that a disabled child under the age of 21 receives the

benefits of a free and appropriate public education. Services include assessment, audiology, counseling, medical services, school health services, occupational therapy, physical therapy, speech therapy, physiological services, and associated transportation. Between 2000–01 and 2003–04, SSAISD received SHARS reimbursements totaling more than $732,000. SSAISD plans to include general counseling services in future SHARS reimbursement requests.

CAREER AND TECHNOLOGY EDUCATION

Section 29.181 of the TEC emphasizes two goals for Career and Technology Education (CATE) programs, stating, "Each public school student shall master the basic skills and knowledge necessary for managing the dual roles of family member and wage earner; and gaining entry-level employment in a high-skill, high-wage job or continuing the student's education at the post-secondary level." Texas Administrative Code chapter 74, subchapter A, requires school districts to offer "programs of study for broad career concentrations in areas of agricultural science and technology, arts and communication, business education, family and consumer science, health occupations technology, trade and industry and technology education that will prepare students for continued learning and postsecondary education in employment settings." The *Texas State Plan for Career and Technology Education 2000–2002* sets six objectives for CATE programs addressing the areas of academic excellence, guidance and counseling, partnerships, curriculum, professional development, and program evaluation.

In SSAISD, CATE courses are available to students on each high school campus and at the Career and Technology Education Center, located on the South San Antonio High School campus. Students are provided transportation if they need a course offered on another campus. Students in SSAISD have the opportunity to take CATE courses in the areas of Business/Office Technology, Family and Consumer Science, Health Science Technology, Marketing, and Trade and Industrial Technology. Some of the courses are designated Tech Prep, and students who successfully complete these articulated courses at local community colleges can receive college credit for courses taken in high school.

Tech Prep is designed to prepare students for the future by placing emphasis on higher-level academic courses taken in conjunction with career and technology education courses. Tech Prep focuses on academic, technical, problem-solving, and critical thinking skills that are needed to prepare students for the requirements of work in the future. Students are

prepared for advanced course work at the post secondary level by the added rigor of the courses. Articulation agreements with community colleges make it possible for students to earn college credit for courses successfully completed at high school. The credits are held in escrow until the student successfully completes the requirements of the articulating college/university.

The district's CATE counselor provides presentations for students, parents, and campus counselors to help them at key points to have the information needed to choose classes and prepare for college. Presentations include information on predictions for future career needs, courses available to students, financial information for parents and students as they consider college, and activities and assessments for students to match their strengths to the needs of various careers.

The district has established partnerships with local community colleges and The Academy, an organization of 18 local districts and universities offering specialized courses in aerospace, information technology and security, and manufacturing technology. The Academy courses are offered at the Advanced Technology Center; located on the old Kelly Air Force Base. Enrollment to these programs is limited with each participating district allocated a few openings. SSAISD has students participating in the Aerospace and Information Technology and Security academies.

BILINGUAL EDUCATION/ENGLISH AS A SECOND LANGUAGE

The Texas Education Code Chapter 29 requires that every Texas student who is identified as limited English proficient be provided a full opportunity to participate in a bilingual or English as a second language (ESL) program. Limited English proficiency (LEP) students are defined as those whose primary language is different from English and whose English language proficiency limits their participation in an English-language academic environment.

All school districts with 20 or more limited proficiency students in the same grade level are required to offer bilingual/ESL or an alternative language program. Schools must provide bilingual education in pre-kindergarten through grade 5. Districts must provide bilingual education, ESL instruction or other transitional language instruction approved by TEA in the post-elementary grades through grade 8. For students in grades 9 through 12, schools are required only to provide instruction in ESL.

School districts are required to identify limited English proficiency students and provide bilingual or

ESL programs as an integral part of their regular educational programs. They must hire certified teaching personnel to ensure that these students have full educational opportunities.

SSAISD offers a bilingual program in PK through 5, a PK through 5 ESL program for non-Spanish speaking students, and an ESL program in grades 6 through 12. The purpose of SSAISD's bilingual/ESL program is to enable LEP students to become competent in speaking, reading, writing, and understanding the English language. The bilingual program consists of dual language instruction, giving students the opportunity to continue learning basic skills in their primary language, and, at the same time, receive instruction in the English language thereby assisting them to make the transition to English. The ESL program is designed to enable students with limited English proficiency to become competent in comprehension, speaking, reading, and writing in the English language so they can participate effectively in the regular instruction program.

SSAISD changed its bilingual program in 2002–03 to a Late Exit Transitional Model. Previously, SSAISD provided general program guidelines to teachers as specified in Chapter 89 and monitored how the teachers implemented the program. Until 2002–03, the district exited bilingual students at the end of grades 2 and 3. Under the Late Exit Transitional Model, the use of English increases annually until the student is able to make the complete transition into an all-English curriculum. Students receive instruction in their native language for concept development with a focus on vocabulary. The model controls the time of instruction in English to ensure the development of the student's native language as well as acquiring the English language. This model is based on research showing that if students learn concepts in their native language their transition to English will be easier. The model provides 20 minutes of instruction in English in a social studies class and 45 minutes of informal English exposure in songs/chants/games and physical education in pre-kindergarten. In kindergarten, students receive 30 minutes of English instruction in social studies. In grade 1 – 45 minutes of formal English instruction, in grade 2 – 60 minutes of formal English instruction and in grade 3 – 60 minutes. In grade 4, students receive 50 percent of instruction in reading, language arts, and math in Spanish and 50 percent in literature, science, and social studies in English. In grade 5, 40 percent of instruction is in Spanish and 60 percent is in English. Students in kindergarten through grade 5 also receive 45 minutes of informal English exposure in art, physical education, and music. The model increased the consistency of implementation across campuses. Under this model, students exit the

program in grade 4 at the earliest. The district is implementing the model gradually. In 2003–04, the district implemented the model in PK and K and will add grade 1 in 2004–05.

SSAISD identifies students with limited English proficiency through the Home Language Survey, a document completed at registration by parents of all newly enrolled students. Parents identify on the survey the primary language spoken in the home and the primary language the student speaks. If either of these is other than English, bilingual aides at the elementary schools and ESL clerks at the secondary schools administer the Idea Proficiency Test (IPT) to the student. Each campus allots half a day per week for testing students. Based on IPT results, students are classified into three categories: non-English Speaking (NES), limited English speaking (LES), and fluent English speaking (FES). The bilingual aides and ESL clerks report the results of the IPT to the campus Language Proficiency Assessment Committee (LPAC).

Each campus has an LPAC consisting of the principal, vice principal, bilingual or ESL teacher(s), bilingual teaching assistants or ESL clerks, the bilingual/ESL program administrator, and a parent of a LEP student. The LPAC reviews student test results and progress and makes recommendations regarding the student's placement in the bilingual/ESL program. The LPAC meets following the testing to ensure that the student is placed within four weeks from time of enrollment. The district provides annual training to LPAC members and to LPAC parents. The LPAC member training takes place in September and the parent training in October. The parent and district staff training addresses the LPAC manual, LEP exemptions, required documentation, provisions for serving LEP students through special education and monitoring student progress.

Students must pass TAKS reading and writing tests and receive an English Speaking Fluent (ESF) score on the IPT Oral before they can exit the program. The LPAC is also responsible for monitoring for two years students who exit the bilingual/ESL program. The bilingual teaching assistants and ESL clerks follow each student and submit a report to the LPAC at the end of the year, using the district's follow-up forms. The LPAC reviews the attendance, behavior, and academic performance of students exited from the program at the end of the first and second year following exit. They also look at students' grades and performance on TAKS.

Exhibit A–13 shows the number of SSAISD students who exited the program each year between 2000–01 to 2002–03. The total number exited from

the program in 2002–03 was lower than the number that exited the program in 2001–02. In 2002–03, the first year the district implemented the Late Exit Transitional Model, SSAISD exited fewer students than in both previous years in every grade except grades 6, 10, and 11 in 2001–02 and grade 12 in 2000–01.

A small number of students were returned to the bilingual/ESL program after they were exited. Six students were returned to the program in 2003–04, 27 students were returned in 2002–03, and 29 students were returned in 2001–02.

Exhibit A–14 shows SSAISD's population of recent immigrants by grade level. Recent immigrants constituted 9.0 percent of the district's LEP population in 2003–04, 9.6 percent in 2002–03, and 11.3 percent in 2001–02.

COMPENSATORY EDUCATION AND TITLE I

Districts in Texas are required to use compensatory education funds to provide support services to students at risk of dropping out and students not performing at grade level. TEA distributes Title I, Part A funds of the Elementary and Secondary Education Act (ESEA) to provide school districts with extra resources to help improve instruction in high-poverty schools and ensure that poor and minority children have the same opportunity as other children to meet state academic standards. Funds are distributed based on the Census Bureau's school district estimates of economically disadvantaged school-age children in their district. Disadvantaged students are typically those who are eligible for free or reduced-priced lunch or breakfast. The students served, however, are selected based on educational need, not economic status. Funds are distributed on the basis of the number of economically disadvantaged students, but students served do not need to be economically disadvantaged. The law allows a school to be designated as a Title I, Part A school-wide program if 40 percent or more of students at the school, or in the attendance zone, are low income. It mandates school districts to use Title I funds for activities that scientifically-based research suggests will be most effective in helping all students meet state standards. Under Title I, Part A districts are required to coordinate and integrate Title I, Part A services with other educational services to increase program effectiveness, eliminate duplication and reduce fragmentation of instructional programs. SSAISD received $2,710,293 in Title I, Part A funds in 2002–03 and $3,697,473 in 2003–04.

Texas began funding compensatory programs in 1975. In 1997, Section 42.152 of the Texas

Education Code was amended to include reporting and auditing systems covering the appropriate use of compensatory education allotment funds. Senate Bill 1873 requires state compensatory education (SCE) funds, like federal Title I funds, to be supplemental in nature, i.e., the funds are to be added to the regular program but cannot take the place or supplant regular funds. SCE fund rules allow a great deal of flexibility in identifying students and creating successful programs. Senate Bill 702 changed the state criteria for identifying students at risk of dropping out of school and requires districts to use student performance for designing and implementing appropriate compensatory, intensive or accelerated instructional programs so these students will perform at grade level at the end of the following school year. This allows districts to use local criteria for identifying at-risk students but these criteria have to be board approved. Senate Bill 702 also requires each district to evaluate and document the effectiveness of the state compensatory education program in reducing any disparity in performance and restricts the amount of SCE funds that a district can use to fund basic services for disciplinary alternative education programs not to exceed 18 percent of the total amount of SCE funds allotted to the district. These changes became effective at the beginning of 2001–02.

In 2002–03, SSAISD had 7,765 students or 77.5 percent of its students classified at-risk **(Exhibit A–15)**. SSAISD had the highest percentage of at-risk students among its peer districts. Its percentage of at-risk students was also higher than the regional and state averages.

SSAISD programs supported through SCE funds include:

- all pre–K and elementary aides,

- one-half of counselors' salaries,

- after school tutoring services on all campuses,

- Communities In Schools case managers, and

- Coca Cola Valued Youth Program that provides assistance to students in grades 7 and higher who are at risk of dropping out by placing them as paid tutors in elementary schools. The program operates in two middle schools and one high school.

SCE also funds a variety of programs including the South San Alternative School, NovaNET, the counseling program, visiting teachers, the TAKS Collaborative, middle school reading program, the pre-K program and the high school summer program. **Exhibit A–16** provides more details about these programs.

SSAISD is a designated schoolwide Title I, Part A program. SSAISD distributes Title I funds to schools based on the number of identified students. Principals provide a fund allocation plan to the Title I director for review and approval. Principals decide how to use the funds. Using Title I, Part A, funds, in 2003–04, SSAISD was able to provide funding for 31 teachers and four aides, as shown in **Exhibit A–17**. Title I also funded elementary counselors jointly with SCE on eight campuses. SSAISD plans to fund counselors in all 10 elementary campuses in 2004–05 with joint Title I and SCE funds.

Title I supports a number of programs including the Title I Non-Public School Cooperative and Families and Schools Together. It also funds services to homeless children, pays for health and medical services for students without health insurance and for continuing education for paraprofessionals. **Exhibit A–18** describes these programs and services in greater detail.

DROPOUT PREVENTION

Texas has set dropout prevention as one of its primary goals. TEA's 2003–04 Performance-Based Monitoring Analysis System incorporates dropout as one of its key data elements. TEA requires districts to report information on students who leave school, which is used to determine a district's dropout rate. Districts must use the guidelines in the *TEA Leaver Reason Codes* to report information on students who withdraw from school. Each school district must develop a comprehensive dropout prevention plan to help keep students from dropping out of school.

SSAISD has had higher dropout rates than the region and state **(Exhibit A–19)**. Over the past five years, SSAISD's dropout rates have varied in comparison to its peers from third highest in 1998–99, to second highest in 1999–2000, to highest in 2000–01, and then to second lowest in 2001–02. SSAISD's dropout rate has been higher than the regional and state dropout rates each year since 1998–99. Information provided by staff indicates that the SSAISD dropout rates have been consistently accurate due to a state-recognized leaver tracking system.

Differences exist between the dropout rates of the district's two high schools. South San Antonio High School's annual and longitudinal dropout rates were two or more times higher than the dropout rates of its comparison group of campuses, a group of 40 schools throughout the state that are demographically most similar to the target school **(Exhibit A–20)**. The comparison schools match the target school in percentage of African American,

Hispanic, Anglo, economically disadvantaged, LEP, and mobile students.

The annual and longitudinal dropout rates of South San Antonio High School West were lower than the dropout rates in South San Antonio High School **(Exhibit A–21)**. They were also below the dropout rates of its campus comparison group.

During 2002–03, 1,360 students left SSAISD. Forty one percent, or 554 of the leavers, were students who graduated. Of the 1,360 leavers, 80 students or 5.9 percent were dropouts according to TEA Leaver Reason Codes. Age and poor academic performance accounted for nearly three-fifths of the dropouts. Of the 1,280 students, or 94.1 percent, who left for other reasons, nearly one-half enrolled in other school districts in or outside of Texas. **Exhibit A–22** shows the reasons for leaving or dropping out.

Exhibit A–23 shows the percent of students who dropped out or left SSAISD by school in 2003–04. South San High School accounted for 57.5 percent of the total dropouts in the district. Of 884 students who left the district's two high schools for reasons other than dropping out, 480 (54.3 percent) were graduates.

Principals, teachers, administrative staff, and parents who responded to a May 2004 survey indicated different opinions about the effectiveness of SSAISD's dropout prevention programs. In response to the question, "The district has effective special programs for dropout prevention," 15.4 percent of principals strongly agreed compared to only 2.6 percent of parents **(Exhibit A–24)**.

SSAISD's Competency Based High School, also called South San Academy, is one of SSAISD's dropout prevention programs. The Competency Based High School is an academic program of choice for high school students who are behind in their credits. The district established the school in 1993. Previously located at a neighborhood church, the Competency Based High School was relocated in 2000–01 to the Dwight Middle School campus. The district plans to move the school to a new location in 2005. The Competency Based High School has a principal, four fully certified teachers, one per content area, a full-time secretary, and a Communities In Schools (CIS) case manager. High school counselors are the only staff members who can refer students to the Competency Based High School. To be admitted, students must have two years of high school and be 17 years old. The school can accommodate between 50 and 60 students who attend the program until they complete all their high school credits and can graduate. The Competency

Based High School is accountable for students who stay there 85 or more days.

Exhibit A–25 shows the number of students enrolled, graduated, and withdrawn from the Competency Based High School from 2000–01 through 2002–03.

Of the 95 students the Competency Based High School served in 2003–04, 35 or 36.8 percent graduated, 27 or 28.4 percent withdrew, and 4.2 percent completed all courses but still have to pass the TAKS. The 2003–04 school's budget was $494,349.

Before students can enroll in the Competency Based High School, they and their parents have to participate in a conference with the principal. The principal reviews their transcript and discusses the courses the Competency Based High School offers. The principal stresses the importance of attendance, as most of the students referred to the Competency Based High School have attendance problems. The school offers an accelerated instructional program combining direct teacher instruction with computer-based instruction. The school uses NovaNET as its computer-based instruction program. NovaNET is a comprehensive online courseware system for grades 6–12 that provides a standards-based, interactive curriculum, integrated assessment and student management and record keeping. The school operates on a nine-week schedule compared with the district's six-week schedule. Although students may complete a minimum of 2.5 credits per semester or five credits per year, they are expected to complete two credits every nine weeks or 4 each semester and 8 per year. In 2002–03, 40 students who attended the school for more than 85 days received seven credits each. Students attend four classes a day from 8:30 to 3:15. The school has four classrooms and a classroom for students in the Teen Age Parent Program (TAPP). Each classroom has six computers that are Internet connected. Each classroom can accommodate up to 15 students. The TAPP is a six-week program for post-partum students who had babies. The students come to class four hours a week in order to get credit for the week and not fall behind academically. The school can accommodate five TAPP students at a time. The district does not provide day care on the high school campus; instead, it contracts with day care centers.

Competency Based High School students who complete all high school credits and pass the TAKS graduate with their respective high school class. Upon completion, the principal has an exit interview with students and their parents. In the exit interview, the principal gets information about students' post graduation plans. The staff encourages students to

attend college and takes students on trips to visit colleges. The school's CIS counselor and Palo Alto College staff help students fill out college financial aid forms.

The Completion Center, housed in two rooms at the South San Alternative School campus, is another dropout prevention program offering accelerated instruction to high school students. The Completion Center was established in January 2003 when the district's in-school GED program closed. Initially, the Completion Center served the students who were in the GED program when it closed. Counselors refer students in grade 10 or in higher grades to the Center. Students referred to the Center typically have behavior problems, absences, are behind academically and are not likely to be admitted to the Competency Based High School. The Completion Center is open Monday–Friday from 8:00 AM to 3:00 PM. The Center plans to expand its hours of operation in 2004–05 to two evenings a week from 5:00 to 7:00 PM. The district purchased 18 computers with NovaNET for the Completion Center through a state grant. The Completion Center has a certified teacher that supervises and monitors student work. Students attending the Center work on the computers for five hours a day. Students typically stay at the Completion Center for a semester. **Exhibit A–26** shows student enrollment and outcomes for January–May 2003 and for 2003–04.

COUNSELING AND GUIDANCE SERVICES

During the 2001 legislative session, the Texas Legislature passed bills relating to the counseling of students regarding higher education. The legislation amended TEC sections 33.001, 33.005–33.006 to require all school counselors to "work with the school faculty and staff, students, parents, and community to plan, implement, and evaluate a developmental guidance and counseling program. The counselor shall design the program to include:" a guidance curriculum, responsive services, a system for individual planning, and system support. In addition, each counselor "shall advise students and their parents or guardians regarding the importance of higher education, coursework designed to prepare students for higher education, and financial aid availability and requirements."

A Model Developmental Guidance and Counseling Program for Texas Public Schools: A Guide for Program Development Pre-K–12th Grade (Third Edition) is published by TEA and contains information necessary for complying with legal requirements. The guide describes program balance, which is to be achieved by allocating resources to the four components of developmental guidance and counseling:

- Guidance Curriculum – planned lessons covering seven areas including self-confidence development, motivation to achieve, decision-making and problem-solving skills, and responsible behavior. School counselors may teach all or some of the curriculum through direct instruction or may consult with teachers who integrate the curriculum into the classroom.

- Responsive Services – interventions on behalf of students whose immediate personal concerns or problems put their continued personal-social, career and/or educational development at risk. Counselors may meet with individuals or groups of students as indicated by the particular setting.

- Individual Planning – guidance for students as they plan, monitor, and manage their own educational, career, and personal-social development. Counselors may perform activities such as conducting group guidance sessions, interpreting standardized test results, and consulting with individual students and their parents regarding colleges and financial aid.

- System Support – services and management activities that indirectly benefit students. Counselors may consult with teachers, participate in development of school-based school improvement plans, and support parent and community relations efforts.

The guide recommends that school counselors divide their time between these four components, depending on the developmental and special needs of students served. The amount of counselor time devoted to each component is to be determined by individual district or school. Allocations will vary, but TEA's guidelines are shown in **Exhibit A–27**.

The two elementary campuses with the smallest enrollment receive two days of counseling support per week from two different counselors; four counselors leave their regular assignment for one day a week to go to two different campuses.

The state recommends that districts maintain records on students who graduate to determine the effectiveness of a district's educational program. SSAISD uses multiple sources for gathering information about their graduates that are both internal through the counseling program and external through programs in which students are involved. During the last year of high school, counselors interview students individually about their future plans and note is made of any institution that receives a student's transcript. Information is recorded in the student's permanent record.

Groups who have tracked students include:

- San Antonio Education Partnership – tracks qualified students through college to graduation;

- Project STAY – tracks participating students to determine progress;

- Upward Bound and Talent Search – conducted by Communities in schools for participating students who are tracked as they continue their educations;

- Texas Workforce Commission – last report was for the class of 2001 and looked at employment and/or education of students once they left high school; and

- Coca Cola Valued Youth – a program of Intercultural Development Research Associates (IDRA) that tracks students though high school graduation and conducts follow-up to track students beyond graduation.

Guidance services in SSAISD are provided by counselors who are assigned to specific campuses and by specialists who serve districtwide in the areas of Migrant Education, Special Education, Career and Technology, and Prevention/Intervention under Safe and Drug Free Schools. State guidelines recommend a counselor student ratio of 1:350. SSAISD's ratio is higher than the recommendation at 1:397. **Exhibit A–28** shows the ratio of counselors to students in elementary, middle, and high school campuses.

HEALTH SERVICES

Children cannot perform well academically if they are unhealthy, undernourished, have vision or hearing problems, have serious emotional problems, or abuse drugs or alcohol. By preventing or alleviating health problems, coordinated school health programs serve the primary mission of schools. According to the American Cancer Society's Healthy Schools Healthy Kids Initiative, quality school health programs result in the following benefits:

- Reduced absenteeism;

- Fewer behavior problems in the classroom;

- Improved student performance;

- Higher test scores;

- More alert students;

- More students with positive attitudes;

- Increased health awareness in children's daily lives; and

- More cooperation among parents, community organizations, and teachers.

No federal or state law mandates that Texas school district provide health services for students without disabilities. However, because 22 percent of Texas children have no health insurance, a school nurse may be the only health professional they see.

School boards have discretion over which services are provided and how they are provided. Since 1992, the Texas Department of Health (TDH) has implemented a School Health Program that provides consultant services to public schools and information and resources to school personnel. TDH also makes competitive grant awards to communities for school-based health centers.

SSAISD's Health Services program is delivered thorough one Registered Nurse (RN) on each campus. As enrollments increase or medical procedures change, aides are reassigned. At the time of the review, 15 RNs, including the coordinator who also serves as nurse on the SSAHS – West campus provide health services in the district. One Licensed Vocational Nurse (LVN) and five health aides serve eight campuses. Current nurse to student ratio is 1:655, better than the 1:750 recommended by the National Association of School Nurses**.** When health aides are included, the health services personnel to student ratio is lowered to 1:480. **Exhibit A–29** indicates 2003–04 nurse to student ratio by campus.

A Peer Review process has been established to review and evaluate nursing services, the qualifications of nurses, the quality of patient care provided by the nurses, the merits of complaints concerning nurses and nursing care, and determinations or recommendations regarding complaints including: the accuracy of nursing assessments and observations and appropriateness and quality of care rendered by a nurse. The district has never been called on to use the process. Also, a Safe Harbor Peer Review process is in place to provide protection for nurses who have been asked to engage in conduct that the nurse in good faith believes would violate the nurse's duty to a patient. This process has been used once.

Nurses are provided one workday each year for training at no cost to the district to maintain their certifications. They also meet monthly as a group after school to discuss issues that arise and to plan for improved services.

Based on records from the Health Services office, districtwide nurses average 33 percent of their time administering medicine, 23 percent assisting students with minor illnesses, and 20 percent administering first aid. Their immunization rate is 99 percent because students are provided shots at their home

campuses. Title I funds are used to cover referrals by nurses for medical, dental, and vision appointments for students without insurance.

Information provided by staff indicates that health services participates in the Medicaid reimbursement program. Funding generated through the MAC portion of the program funds one registered nurse position and has provided funding for the purchase of computers for all district clinics.

MIGRANT EDUCATION

The *Improving America's Schools Act* of 1994 authorizes state education agencies to coordinate education programs for migrant students. Section 1301 of Title I, Part C of the Act (Public Law 103–382) states that migrant funds must support education programs to help reduce education disruptions that occur from moving repeatedly and ensures that migrant students receive the education that best fits their needs. To meet the needs of migratory children, the Texas Migrant Education Program has established seven areas of focus: (1) migrant service coordination, (2) early childhood education, (3) New Generation System for Migrant Student Records Transfer, (4) parent involvement, (5) identification and recruitment, (6) graduation enhancement and (7) secondary credit accrual and exchange. The Office of Migrant Education in the U.S. Department of Education provides grants through the TEA to districts based on the enrollment of migrant students in the district.

The main objective of SSAISD's Migrant Program is to help migrant students succeed academically by providing instructional activities and support services to meet individual and family needs. SSAISD's Migrant Program is supervised by the Title I director of Accelerated Instruction and funds four staff members, a counselor, and two para-professionals assigned to two secondary schools. Ten campus liaisons spend approximately10 percent of their time helping migrant students and supporting the migrant program on their respective campuses. The New Generation System is an Internet-based system for the transfer of migrant student education and health records among a consortium of participating states. SSAISD's migrant education budget for 2003–04 was $132,762. The 2002–03 budget was $148,619; and the 2001–02 budget was $141,418.

SSAISD had 283 migrant students in 2003–04, or 2.8 percent of the district's total enrollment. As shown in **Exhibit A–30**, the district's percent of migrant students ranged from 4.2 percent to 2.8 percent between 1999–2000 and 2003–04. In 2003–04, Palo Alto Elementary, South San High School, Price Elementary, Carrillo Elementary, and Athens

Elementary had the largest number of migrant students.

The Migrant Program provides school supplies, backpacks, and summer reading books. It addresses the social needs of students by referrals to outside agencies such as Centro del Barrio for health and medical services, the DePaul Family Center and Wesley Community Center for social services, Remingo Valdez Subdivision for migrant housing, and the United Way Helpline. The Migrant Program has also started in 2003–04 a support program for highly mobile students to help them access more services.

The Migrant Program encourages parents to prepare their children for school and participate in their child's education. Through its home education program, the Migrant Program works with migrant parents of pre-school children three to five years old who are not enrolled in programs like HeadStart. Using the Building Bridges curriculum, migrant staff visits homes at least once a month showing parents how to work with their children on educational activities. In 2003–04, the home education program served 24 children. The Building Bridges program is one of the strategies listed in SSAISD's *A Blueprint for Success* for facilitating a successful transition to school.

The Migrant Program monitors student performance on a continuous basis. Program staff prepares a report on every migrant student every six weeks and submits it to respective school counselors and principals. The Migrant Program offers counseling, leadership training, and tutorial sessions at the secondary level. Migrant students can participate in University of Texas correspondence courses and get credit by exam. Migrant Program staff asks high school counselors to encourage migrant students to take the SAT/ACT. Before the 2000 TEA District Effectiveness and Compliance (DEC) audit, counselors told migrant students that if they did not take the SAT/ACT they could take the college admission tests offered at the college or university. Although the DEC report highlighted the lack of migrant student participation in SAT/ACT, information provided by the district indicates that 66.7 percent of graduating migrant seniors took the SAT or ACT in 2002–03 and 100.0 percent in 2003–04. The district currently offers fee waivers to migrant students who take the SAT/ACT. In 2002–03, 40 percent of the migrant students in the graduating class enrolled in universities.

The Migrant Program has increased migrant parent involvement in the last two years. It provided parents with English instructional videos. It also tried to change the mindset of parents by stressing the

importance of higher education and the setting of long-range goals for their children. SSAISD's district improvement plan, *A Blueprint for Success*, includes strategies for informing parents about the educational system from early education toward timely graduation.

The Migrant Program's parent organization meets monthly and encourages parents to manage the meetings. The district sent five migrant parents to the National Migrant Parent Conference in San Antonio in 2003–04. Parents of migrant students helped build an outdoor classroom for science projects and dancing performances that the SMART program plans to use.

The Migrant Program offers a summer program titled Summer Migrant Accessing Resources through Technology (SMART). In the summer of 2003, 187 migrant students participated in the eight-week program. That summer, SSAISD began to include teachers from the Binational Migrant Education Program. The purpose of the Binational Migrant Education Program is to facilitate sustained educational services for students whose families travel between Mexico and the U.S. in pursuit of temporary seasonal work in agriculture and fishing. In 2003, SSAISD hosted two teachers from Mexico in its SMART program; in 2004 it will host four teachers. SSAISD was the only district in Region 20 in 2003 to participate in the Binational Migrant Education Program. In 2004, SSAISD will be the only Region 20 district to receive funding to host four teachers from Mexico.

Exhibit A–31 compares the percentages of SSAISD migrant and non-migrant students who passed TAKS by grade level and TAKS section. SSAISD migrant students' performance on the TAKS was similar to or better than the performance of non-migrant students in grades 4, 5, and 10, grade 6 math and grade 8 math. It lagged behind the performance of non-migrant students in grade 3 math and reading, grade 6 reading, grade 7, grade 8 reading and social studies, grade 9 and grade 11.

GIFTED AND TALENTED EDUCATION

Section 29.122 of the TEC states that school districts "shall adopt a process for identifying and serving gifted and talented students in the district and shall establish a program for those students in each grade level." Section 29.123 requires the State Board of Education (SBOE) to "develop and periodically update a state plan for the education of gifted and talented students" to be used for accountability purposes "to measure the performance of districts in providing services to students identified as gifted and talented." The SBOE plan, adopted in 1996 and

revised in 2000, provides direction for the refinement of existing services and the creation of additional curricular options for gifted and talented (G/T) students.

The *Texas State Plan for the Education of Gifted/Talented Students* establishes three levels of performance measures—*acceptable, recognized, and exemplary*—for five program areas: student assessment, program design, curriculum and instruction, professional development, and family-community involvement. "Acceptable" performance measures are those required by state law or rule. The "recognized" and "exemplary" measures are provided as "viable targets that local district educators seeking excellence, both for their district and for its students, may strive to attain." The components required for "acceptable" status as well as those required for districts seeking "recognized" or "exemplary" program status in curriculum and instruction is indicated in **Exhibit A–32.**

South San Antonio ISD serves gifted children by clustering groups of six to seven identified students in a general education classroom for grades K–5. Gifted students are served in pre-Advanced Placement and Advanced Placement (AP) classes with other high-ability students in grades 6–12. Students are served in the four core academic areas; English/language arts, math, science, and social studies. The district does not identify students gifted in the arts, leadership, or creativity.

In addition to grouping students in a classroom, campuses may choose to pull students from the classroom to work together on various projects, identify talented primary students for a "talent pool" for the purpose of providing activities that focus on extending student thinking, or form multi-aged classes at the high school. Students may choose to test out of grades or courses through Credit by Exam and to accelerate their learning through correspondence or Dual Credit courses.

The process the district used to identify students resulted in the identification of too many students and was reevaluated in 2000–01. The revised identification process is in its second year of implementation and informal evaluations by the district indicate that it is producing the desired results as evidenced by an enrollment decline 6.3 percent in school year 2003–04, down from 7.2 percent in 2002–03. Students identified as special education and bilingual/LEP are served in the gifted program.

Exhibit A–33 shows that the percent of students identified is within state and regional ranges and that the district spends more money on its gifted program than peer districts, the Region 20, or the state.

Funds are provided annually for K–12 teachers to purchase enrichment materials for the classroom. In addition, supplementary curriculum has been purchased for K–8 classroom teachers. Teachers are required to use the district's curriculum documents as the basis of instruction and to differentiate or provide more rigorous activities for gifted students in the classroom. To accomplish this, all teachers working with gifted students receive training.

All personnel who work with or make program decisions that affect gifted students must by state guidelines receive training in the nature and needs of those students. Classroom teachers must meet an initial training requirement of 30 hours; while counselors, campus, and central administrators are required to have six hours of mandatory training. Classroom teachers who work with students who are G/T must also obtain six hours of updated training annually. The G/T Office notifies those without training or those who need to fulfill update requirements and monitors them through written communication until they receive proof of fulfilled training.

To provide G/T training, the district belongs to a Region 20 cooperative that provides all levels of training for teachers and staff working with gifted students. In addition, the district provides limited personnel training on staff development days. The district, however, covers expenses for all training through G/T funds.

Assessment, curriculum resources, and instructional opportunities are evaluated annually through surveys of parents, students, and teachers. Changes to the program have occurred as a result of the evaluations and include the following:

- Formation of a G/T Parent Partnership Advisory Council;

- Creation and implementation of G/T Core Content Selection Forms;

- Creation and implementation of a G/T Student Performance Report;

- Evaluation of assessment procedures and instruments; and

- Identification and implementation of an enrichment curriculum.

CHAPTER TWO
BOARD GOVERNANCE

The board holds scheduled meetings on the third Wednesday of every month at 6:30 p.m. in the boardroom of the district administration building located at 2515 Bobcat Lane, San Antonio. In 2002–03, six monthly board meetings were held at selected schools, including Benavidez Elementary, Dwight Middle School, Shepard Middle School, South San Antonio High School, Five Palms and West Campus High School. The meetings were held at the various schools across the district to encourage community and parent participation in the meetings. All meetings during the current school year have been held at the administration building. The board may hold special meetings or workshops in addition to the regular monthly meeting.

CHAPTER THREE
PURCHASING AND ACQUISITION
MANAGEMENT

School districts must comply with the purchasing requirements identified in the Texas Education Code (TEC), Chapter 44, Subchapter B. **Exhibit A–34** outlines the TEC purchasing requirements.

In purchasing goods and services that are greater than $25,000, districts may consider many factors. These include factors such as: the overall purchase price and long-term cost; the vendor's reputation and past performance; the quality of the goods and services offered; and the extent to which the goods and services offered meet the district's needs. For goods and services between $10,000 and $25,000 in value, the district can use one of two methods. The district can either use the same methods and the factors established for purchases that are greater than $25,000 or it can obtain quotes from an established vendor list with the purchase being made from the lowest responsible bidder who provided a quote.

Exhibit A–35 compares the size and staffing of SSAISD's Purchasing Department to its peers. SSAISD compares favorably to its peers. SSAISD and Roma ISD have two purchasing staff, while Mercedes and Harlandale ISDs each have three staff. Edgewood ISD has the largest number of purchasing staff with six.

SSAISD employs a Warehouse supervisor, three Warehouse employees, and a secretary **(Exhibit A–36)** to maintain a central warehouse facility with more than 20,000 square feet of space that houses district records and both general and food service consumable items. The district does not keep items awaiting disposal in the warehouse due to a lack of space; they are shrink-wrapped and stored outside on pallets and subject to the physical elements. The Warehouse supervisor reports to the director of Plant Operations.

The district warehouse is used to centrally receive consumable goods and supplies such as janitorial supplies, school supplies, and large cooperative purchases of paper. Items are stored until needed or requested by schools and departments via

requisitions. The warehouse is also used for records storage. The food service warehouse stores United States Department of Agriculture commodities and paper goods. Since January of 2004, the Food Services Department implemented direct vendor delivery of weekly grocery orders to campuses.

CHAPTER FOUR
DISTRICT MANAGEMENT AND COMMUNITY RELATIONS

Exhibit A–37 describes SSAISD's current external and internal communications. Three schools, Armstrong Elementary, South San Antonio High School, and Shepard Middle School, distribute monthly newsletters. The majority of schools distribute monthly calendars of events to parents. The SSAISD director of Technology is the district's Webmaster.

CHAPTER FIVE
FACILITIES MANAGEMENT AND SAFETY OPERATIONS

In SSAISD, the administrator for School Support Services supervises district facilities as well as maintenance, construction, transportation, food service, police, warehouse, athletics, and special projects. The administrator for School Support Services reports directly to the superintendent and is the district's primary point of contact with architects, engineers, and for all facility related matters. **Exhibit A–38** presents the SSAISD Maintenance and Operations Department.

The SSAISD maintenance section consists of a supervisor and 27 skilled and semi-skilled craftsmen operating from the district transportation facility. This section uses one portable building for its plans room and filter storage area. The general maintenance section uses a small building at Athens Elementary for the construction of cabinetwork and other small projects. The maintenance supervisor position reports to the director of Plant Operations and provides field supervision of maintenance personnel. The maintenance supervisor position is vacant, so the director of Plant Operations has assumed supervisory duties of field maintenance personnel.

Two supervisors, one for daytime operations and one for nighttime operations, manage the district's custodians. These custodians report to the director of Plant Operations. The 74.5 full-time equivalents include head custodians who in turn report directly to the two operations supervisors.

Cleaning workloads are based upon a time allocation method, where a specific amount of time is determined for each cleaning task. Applying this time allocation to the custodians' eight-hour shift, the supervisor can judge the custodians' progress during the shift. This time allocation method is common and equates to each custodian cleaning 21,233 square feet during an eight-hour shift. This is an acceptable amount of cleaning per custodian since the custodians are responsible for replacing bulbs and other minor maintenance items.

The SSAISD Maintenance and Operations Department supports 24 schools and administrative facilities totaling 1,581,925 square feet as shown in **Exhibit A–39**. Thirty-seven portables comprise 53,280 square feet of the total square footage.

The district funded two new schools and additions and renovations to existing schools with a $35 million bond issue in 1999 and a $35.5 million one in 2002. Before the 1999 bond election, SSAISD hired a contractor to conduct a needs assessment based upon site inspections and subsequent building recommendations for repair or replacement. Although there is mention of documented recommendations by the contractor in a *Needs Assessment and Strategic Planning Study* in several of the district's files, no one in the district could locate or produce a copy of this document despite repeated requests for the information.

The district selected and paid an architectural firm a fee of 7 percent of actual construction costs for design services associated with the 1999 bond program, with a fee of 7 percent of actual construction costs. The architects were paid based on monthly invoices outlining the architect's statement of services and allowable reimbursable expenses outlined in the contract. The district paid the construction project management firm $1,250,268 for project management services. The phase one and two construction contracts were awarded to one firm, while phase three, consisting of air conditioning replacement and repair, was awarded to a second firm. **Exhibit A–40** summarizes the 1999 bond program construction costs by project.

As shown in **Exhibit A–40**, there were two large change orders, one for South San High School and one for Shepard Middle School. The South San High School change orders were caused by a change in the scope of work after the project was bid and included additional work in the lunchroom/kitchen area. Shepard Middle School change orders were caused by changes in the scope of work and in regulatory requirements and mechanical items left out during the design phase.

Carrillo Elementary was originally scheduled to receive air conditioner repair in phase 3. When overall construction costs exceeded the projected budget, repairs were made with operational funds,

and the Carrillo project was removed from the program. Additional funds from General Fund fund balance and grant money made up the difference between the budget and the final amount.

All projects are complete except for numerous American with Disabilities Act (ADA) issues, which the district is addressing through litigation against the architect and engineers. These problems occurred in every school renovated during the 1999 bond program as well as the new elementary school, Benavidez. The issues ranged from the size, height, and arrangement of toilets, lavatories and mirrors in bathrooms to accessibility issues and parking lot signage. As of August 4, 2004 the problems were still unresolved.

In preparation for the 2002 bond program, the district hired an architectural firm not previously used for the 1999 bond program to assist in developing the list of proposed improvements for the 2002 bond issue. The district requested written input from principals in the form of wish lists and compiled them into a packet, *South San Antonio ISD Bond 2002*. This packet was part of the base documents used to develop the final 2002 bond program. For the 2002 construction projects, the district selected the Construction Manager at risk (CM at Risk) construction method. The district hired a management group not used in the 1999 bond-project oversight for a not to exceed fee or a guaranteed maximum price of $906,182 as long as the original scope of work is not increased. This group provides monthly construction progress reports to the Board of Trustees.

Exhibit A–41 outlines the 2002 bond program projects. The 2002 construction projects were grouped in phases and recently completed the design phase. Architectural fees established for the projects range from 6.35 percent to 6.8 percent for new construction and 7.44 percent to 8.4 percent for renovation design. One small, complicated project of $75,000 at Dwight Middle School cost 12.5 percent for the design work.

As a measure of control for the project, the architect, project manager, and the administrator for School Support Services must review all change orders. If the change order is less than $50,000, the board has authorized the superintendent to approve the order. If it is more than the specified amount, board approval is required. The project manager is allowed to authorize work directives of less than $5,000 per occurrence on a time and material basis if it prevents schedule delay. These work directives are later incorporated into a formal change order. Construction of the new middle school and the Community Learning Center projects as well as the

renovations and additions to existing buildings are anticipated to begin during the summer of 2004.

CHAPTER SIX
COMPUTERS AND TECHNOLOGY

For this review, SSAISD selected four peer districts for comparative purposes: Harlandale, Roma, Mercedes, and Edgewood Independent School Districts (ISDs). **Exhibit A–42** compares 2002–03 technology expenditures for SSAISD and its peers. SSAISD spent $76 per student for the 2002–03. This compares to $121 per student for Mercedes ISD at the high end to Edgewood ISD $62 at the low end. SSAISD is spending $11 more per student than Region 20 but $6 less than the state average per student for technology services.

Exhibit A–43 compares SSAISD technology expenditures as a percent of total district budget for 1998–99 through 2002–03 to Region 20 and state expenditures for the same period. For the past five years, SSAISD has spent approximately the same percent of its total budget as Region 20 and the state.

To assist it in obtaining and improving its technology and telecommunications infrastructure, SSAISD has applied for E-rate funding and grants. E-rate provides discounts to assist most schools and libraries in the United States to obtain affordable telecommunications and Internet access. The Schools and Libraries Division (SLD) of the Universal Service Administrative Company (USAC), a not-for-profit corporation appointed by the Federal Communications Commission (FCC) to ensure that the benefits of telecommunications services reach students and communities across the country, administers the program. **Exhibit A–44** shows SSAISD's E-Rate funding for the five-year period from 1999–2000 through 2003–04. As shown, the largest category of E-rate expenditure has been internal connections, followed by telecommunication services.

In addition to E-Rate, SSAISD also has secured grant funding to support and improve its technology. From 1999 through 2002, SSAISD applied for and received Telecommunication Infrastructure Fund (TIF) grants totaling $860,000 to improve its infrastructure. TIF funding was frozen in 2003 because of budget constraints.

SSAISD also applied for and received Technology Applications Readiness Grants for Empowering Texas students (TARGET) grants. The TARGET grants focus on serving students at risk of dropping out of school as part of the Enhancing Education Through Technology component of the No Child Left Behind Act. In 2002–03, SSAISD received $9,672 to enhance technology in core subjects such

as social studies and science. For 2003–04 and 2004–05, SSAISD received $90,000 as part of an initiative to allow teachers to participate in an online degree plus certification program that will improve teachers' ability to effectively integrate technology into the curricula.

Protecting the district's technology assets by accurately accounting for both the hardware and software is a primary responsibility of the Technology Department. The Technology Department completed the last inventory in May 2003. The hardware specialist attached bar code tags to the computers listed in the inventory as well as on new computers that arrived during 2003–04. The Technology Department owns a Percon Model Falcon 320 scanner that allows the district to upload its computer inventory into the scanner for periodic physical checks. If staff encounter missed devices during physical inventory checks, they reconcile the reason for the equipment not being on the list and subsequently make appropriate additions to the inventory.

SSAISD uses the Texas School Technology and Readiness (STaR) chart to evaluate its progress in implementing technology. The Texas Education Agency Educational Technology Advisory Committee (ETAC) developed the STaR Chart, an online resource tool for self-assessment of a school district's efforts to effectively integrate technology across the curriculum. The statewide Educational Technology Coordinating Council's (ETCC) State of Texas Master Plan for Educational Technology 2000–03 recommends that districts use this tool as the standard for assessing technology preparedness in K–12 schools.

The state designed the Texas STaR Chart for use in technology planning, budgeting for resources, and evaluating progress in local technology projects. Many districts use the online assessment may be used with staff, administrators, technology directors, school board members and community leaders to plan for future growth. The Texas STaR Chart and the accompanying Campus Analysis of STaR Form profile the district's status toward reaching the goals of the *Long-Range Plan for Technology (LRPT), 1996–2010.* The profile indicators place the district at one of four levels of progress in each key area of the LRPT: Early Technology, Developing Technology, Advanced Technology, or Target Technology. The Key Area totals or scores provide a way for local districts to measure implementation of a variety of technological applications.

Exhibit A–45 summarizes SSAISD's STaR results for Spring 2003–04 based on self-evaluation and ratings provided by the district's principals. These

ratings indicate that the district is making progress in the implementation of technology districtwide at the beginning of the StaR chart's Advanced Stage.

The district developed a long-range Technology Plan, the *South San Antonio ISD Technology Plan 2004–2007* that complies with the State Board of Education *Long-Range Plan for Technology 1996–2010.* The state plan calls for districts to focus local technology plans into four areas: teaching and learning, educator preparation, administration and support services, and infrastructure. SSAISD electronically submitted the plan electronically via the Texas e-Plan system to Region 20 for review, approval, and submission to TEA for final approval.

Districts are required to have an approved technology plan to participate in E-Rate. In addition, Title II, Part D, Enhancing Education Through Technology, of the federal No Child Left Behind Act requires district applications for funding to contain an educational technology plan that is consistent with the statewide educational plan. The district's Technology Plan also correlates to these applicable E-Rate and No Child Left Behind requirements.

Sound infrastructures allow students, teachers, and staff to access people and information inside the district and beyond enabling them to be more efficient and more productive. **Exhibit A–46** shows SSAISD's network configuration.

The network is designed as a hub and spoke. In the middle, or the hub of the Wide Area Network (WAN), is the Central Office. There are three routers and an ATM switch at this location. A fiber connection attaches to Southwestern Bell who in turn supplies the OC3 connection. There are also four connections that Southwestern Bell provides with T1 connections.

The T1 connections are connected to Region 20 who provides the district with Internet access and the mainframe system used to maintain districtwide business and student data. Each school and administrative office is connected to the network. Almost every site has a T1 connection. Most of the schools are setup in a similar fashion. The T1 comes into a router on an ATM connection.

In the fall of 2003–04, the district added a new service that provides an extremely fast connection between the Central Office and each secondary school. These connections are made at Dwight Middle School, Kazen Middle School, South San Antonio High School and South San Antonio High School West Campus. Shepard uses the fiber connection to West Campus to receive this service.

CHAPTER SEVEN
HUMAN RESOURCES
MANAGEMENT

The SSAISD Human Resources Department shares an executive director with the Student Services Department. The Human Resources Department serves the personnel needs of the district, while the Student Services Department serves the health needs of the schools. **Exhibit A–47** depicts the organization chart for Human Resources and Students Services.

The Human Resources Department is responsible for recruiting and it oversees the hiring process. The department also processes personnel paperwork including benefit selection, confirmation of certifications and preparation of contracts; maintains the PEIMS staffing database; and monitors absences to ensure federal and state regulations are properly applied.

Each district has a unique organizational culture that is reflected in the type and numbers of its staff. **Exhibit A–48** compares SSAISD's staffing ratios to the state and its peer districts selected for this review: Harlandale, Edgewood, Roma, and Mercedes Independent School Districts.

Exhibit A–49 shows the average salary trends in SSAISD.

Although district salaries have generally increased, SSAISD competes against area school districts to attract the best employees. Two peer districts, Harlandale and Edgewood ISDs, border SSAISD. **Exhibit A–50** compares SSAISD to averages for area peers, Region 20, and the state.

As shown in **Exhibit A–50**, SSAISD has the highest average salaries for teachers and professional support staff. It has the lowest average salaries for central administration. SSAISD has six salary schedules: teachers, administrative and professional employees, clerical or technical employees, computer technology support, manual trades personnel, and substitutes. Teachers, administrative and professional employees have additional compensation opportunities by accepting additional duties paid for by stipend. The district also pays professional staff for attending summer training. Auxiliary employees have limited opportunities to earn overtime or compensatory time off with the exception of Maintenance Department staff, and peace officers that work during extra-curricular events.

Auxiliary staff is hired for 240 days or 260 days. A 260-day employee is a full year employee. A 240-day employee is hired primarily for those days school is in session. Both 260-day employees and 240-day employees receive 10 days of paid personal leave each year. Professional staff is hired primarily for 260 or 240 days. With some exceptions, teachers are hired for 187 days.

The Texas Education Code §21.102 requires teachers and principals be employed under a written probationary contract, continuing contract, or term contract. A term contract has a termination date and requires that both parties agree to extend the term or enter into a new contract. A continuing contract has no end date and can be terminated by the employee or by the district if the employee is not performing to standards. SSAISD has 401 employees on continuing contracts and 406 employees on term contracts.

A district's success depends on its ability to employ competent staff, which includes the ability to hire replacements timely for both planned and unplanned vacancies. While some districts hire trained recruiters, the director of Personnel Services and the executive director for Human Resources and Student Services perform SSAISD recruitment activities. Although the district competes for the San Antonio area talent pool, SSAISD has been successful in starting each school year with few vacancies.

When an employee leaves a job, it costs the organization to hire and train a replacement.

Along with the start of year vacancy rate, another measure of personnel program success is the employee turnover rate for the organization. Turnover rates show the amount of staff that leaves a job during a specified period. While some turnover is healthy, high turnover is costly. **Exhibit A–51** compares turnover rates for SSAISD and its peer districts.

While SSAISD's teacher turnover has increased slightly, it is still below that of its peer districts and the regional and state averages. The district provided early retirement incentives in 2000–01 and again in 2003–04, which may account for the increases. The large number of employees on continuing contracts may also play a role in the low turnover rate.

Effective personnel administration relies heavily on information management. SSAISD does not host its own personnel and payroll system, but contracts with Region 20 for access to an education specific financial system. The Internet-based Texas Computer Cooperative Software (iTCCS) includes personnel, payroll, and position management applications. The applications capture employee information and activity from newly hired to termination. The information integrates with the budget and accounting applications for proper financial management.

The Position Management System can track all positions within the district, including proposed, filled, and vacant positions. The application retains a history of each position that includes a history of the employees who have held the position. The history also tracks each employee and the positions he or she has held. The district can perform budget simulations and forecasting, and calculate vacancies. It also performs basic personnel functions such as position transfers, new hire and termination administration, and compensation updates that post to the payroll system.

The Personnel System can track professional and paraprofessional credentials, link credentials to courses taken, and calculate if the "highly qualified status" required by NCLB has been met. The application also tracks insurance benefit information. It has the ability to produce employee service records and other records specific to PEIMS reporting.

The Payroll System produces paychecks. The application produces all mandated reports and posts payroll costs to the general finance ledger. The system accounts for leave by teacher and substitute and will interface with many commercial, time-keeping systems. The district is in the process of implementing the KRONOS™ time-keeping system, which will feed the payroll system, reducing the need for manual timesheet entry.

The district also uses SubFinder™, which is a commercial software application that locates and contacts substitute employees if a teacher is unexpectedly unable to come to work. The Human Resources Department staff manages the software system and is able to retrieve immediate feedback on the status of any substitute search.

CHAPTER EIGHT
FINANCIAL AND RISK MANAGEMENT

Exhibit A–52 presents the organization of SSAISD business services functions.

Financial staff performs the following duties:

- The secretary performs clerical duties such as typing, opening mail, and answering the phone. In addition, the secretary is responsible for receiving and processing the first report of injury for workers' compensation, arranging medical treatment for injured workers, and verifying worker status until they return to work. The secretary also prepares deposits for funds received at the central office.

- The payroll supervisor is responsible for overseeing payroll and the work of the payroll bookkeepers and payroll clerk. The key duties of the supervisor include reviewing and processing all external reports, such as those to the Teacher Retirement System (TRS), the Texas Employment Commission (TEC) and the Internal Revenue Service (IRS); processing payments for the payroll liability accounts; preparing the salary accrual for the external auditor; and assisting district employees with payroll questions.

- The payroll bookkeepers generate the payrolls for the professional and paraprofessional employees semi-monthly, produce the payrolls for manual trades and auxiliary employees bi-weekly, and maintain payroll files and leave records for all employees. The payroll bookkeepers also generate checks for the monthly retirement incentive payments, monthly travel payments, monthly supplemental payments to employees, and, during the summer, the semi-monthly payments for summer programs.

- The payroll clerk processes leave and time cards for paraprofessional employees, processes supplemental pay such as tutoring and other extra duty, is responsible for the Payroll Office supplies, and helps the payroll bookkeepers as necessary.

- The general accountant reviews purchase orders for coding, verifies support, and approves all checks, records fixed assets and produces reports used for the annual inventories, prepares the depreciation schedule for the external auditors, reviews the bank reconciliations for the activity funds, and provides training for business office and activity fund procedures to employees.

- The director of budget and fiscal services is responsible for accounting, budgeting, general ledger maintenance, accounts payable, employee insurance, and workers' compensation, and is supported by and oversees the work of three bookkeepers and three accounts payable clerks. The director of budget and fiscal services is also one of the investment officers of the district, maintains the monthly cash flow analysis for district funds, and is the liaison with the district's employee insurance committee.

- The bookkeepers reconcile the district bank accounts, input budget changes, record deposits, generate monthly financial statements from the accounting system, ensure the accounts payable and payroll ledgers balance with the general ledger, verify funds are available for purchase orders, prepare monthly journal entries, prepares

fund transfers for accounts payable and payroll, generate the monthly reports for fixed asset acquisitions, assimilate the budget information from schools and departments, and provide the electronic files to the bank for positive pay.

▪ The accounts payable clerks pay all non-payroll related bills for the district. Each accounts payable clerk is responsible for paying vendors in a section of the alphabet: A through F, G through P, and Q through Z. The clerks receive the yellow copy of the purchase order when it is approved, receive the pink copy of the purchase order from the school or department when the merchandise is received, and match both to the invoice from the vendor before entering the invoice in the system for payment. Once ready for payment, the general accountant reviews the documentation and approves the issuance of the check.

Texas school districts receive revenue from three primary sources: local sources, state funding, and federal programs. Property taxes provide the primary local source of funds for most school districts. School districts develop and adopt their tax rate while county appraisal districts appraise the value of property within the district. The combined rate is applied to the assessed property value to compute the district's total tax levy.

SSAISD levies property taxes composed of a maintenance and operations (M&O) component and an interest and sinking (I&S) component. The taxes collected from the M&O component are used to fund the general operations of the district, and the taxes collected from the I&S component are used to pay the district's bonded indebtedness. **Exhibit A–53** presents the tax rates for SSAISD, the peer districts, Region 20, and the state.

SSAISD's total tax rate increased by 5.8 percent from 1999–2000 through 2003–04. The M&O component increased by 2.7 percent during this period and is at the $1.50 state imposed cap. The I&S component of the tax rate increased by 33.2 percent since 1999–2000 due to the debt requirements of the 2002 bond issue. SSAISD adopted its 2003–04 tax rate in August 2003. **Exhibit A–54** shows the changes in the SSAISD tax rate from 1999–2000 through 2003–04.

SSAISD contracts with Bexar County to collect its taxes. The district contracts with Linebarger, Goggan, Blair & Sampson, L.L.P. for the collection of delinquent taxes. The firm collects a 15 percent penalty of the taxes due from the taxpayers as a fee for their services.

Exhibit A–55 shows the tax levy, current year levy collected, delinquent taxes collected, and penalty and interest collected for 1999–2000 through 2003–04. SSAISD has total tax collections ranging from 97 to 101.8 percent of the levy and has budgeted a 97.5 percent collection rate for 2003–04.

Property values are important determinants of school funding at the state and local level. There is an inverse relationship between local property wealth and state aid: the greater the property wealth of the district, the greater the amount of revenue raised locally, but the lower the amount of state aid.

SSAISD receives funding from the state based on a formula approved by the Legislature. In general, the funding is based on the number of students in average daily attendance in the district. The funding formula also contains additional funding for programs designed to benefit students with special needs.

SSAISD receives federal funding from the U.S. Department of Health and Human Services and U.S. Department of Education directly. Funding is passed through TEA and other agencies to assist in providing educational, health, and vocational opportunities for SSAISD children. SSAISD also receives funding from the U.S. Department of Agriculture to assist in providing students with nutritious meals and from the U. S. Department of Defense to assist in funding the district's ROTC program. In 2002–03, these funds totaled $11.9 million.

SSAISD's total revenues have increased by 10.9 percent from 1999–2000 through 2002–03. The largest increase by revenue source was in local tax revenues during this period. This increase is primarily due to an increase in property values and increased tax collection effort by the district. Other local revenues have declined by 45.7 percent during this same period primarily due to the decrease in interest earnings. **Exhibit A–56** compares revenues by source for 1999–2000 through 2003–04 for the general, food service, and debt service funds.

SSAISD also receives state funding from the Instructional Facilities Allotment (IFA) and Existing Debt Allotment (EDA) to pay a majority of the payments, approximately 80 percent, on its bonded indebtedness for facilities. The IFA is a state program to assist property-poor school districts with facility upgrades and acquisition. The EDA is a state program to pay a portion of district's bonded indebtedness based on the local tax effort.

In 1999–2000, SSAISD refunded $2.7 million in 1994 bonds with the issuance of the series 2000 bonds. Without the refunding of the 1994 bonds, the

state percentage of total bond payments is 83.1 percent. The increase in payments for 2002–03 is the result of the issuance of the 2002 bonds. **Exhibit A–57** presents the state and local share of debt repayments for 1999–2000 through 2003–04.

The SSAISD board unanimously approved a referendum for voters to decide on two bond propositions in the June 12, 2004 bond election. The first proposition was for $40.5 million to be used for classroom additions, site improvements, renovations, repairs, system upgrades, technology upgrades, and equipment. This proposition would be supported by state funding of approximately 78 percent, if approved for IFA funding by the state. The district has stated that the bonds will not be issued if the state does not approve the IFA funding.

The second proposition was for $10.5 million to be used for items not covered by the IFA such as athletics, administration, transportation, and warehouse centers. These bonds would be the responsibility of SSAISD taxpayers. The proposition one bonds passed on June 12, 2004 with 136 votes for and 106 votes against and the proposition two bonds failed with 120 votes for and 123 votes against. The 1999 and 2002 bond issues passed by votes of 1,333 for and 765 against and of 434 for and 127 against, respectively.

The district had outstanding bonded debt of $84 million in 2002–03. The original issue amount of the bonds was $109.3 million. **Exhibit A–58** presents information on these outstanding bonds.

The expenditure of bond funds is accounted for in the capital projects fund. Since the expenditure of the funds may take several years based on construction progress, the fund shows the bond proceeds and interest earnings in the year received and the expenditures in the year made. Fund balance in the capital project fund represents unspent bond funds and interest earnings. **Exhibit A–59** summarizes the SSAISD capital projects fund for 1999–2000 through March 2004.

The FASRG requires school districts to account for expenditures by the type or object of the expenditure. **Exhibit A–60** presents SSAISD expenditures by object from 1999–2000 through 2003–04. The 53.2 percent increase in supplies is due primarily to increased food costs and general supplies purchased with federal funds. The 54.7 percent increase in other operating expenditures is due mainly to the increased cost of insurance and student travel. The 39.1 percent increase in debt service expenditures is due to the additional bond issue in 2002. The 169.2 percent increase in capital outlay is

due primarily to the capital projects fund bond expenditures.

The FASRG mandates the use of function codes by school districts to track expenditures for different school district operations. **Exhibit A–61** presents budgeted operating expenditures per enrolled student by function code for SSAISD and its peer districts. These expenditures include payroll, contracted services, supplies, and other operating object codes, but exclude the debt service and capital outlay object codes. This is referred to as operating expenditures as the excluded objects support the district's infrastructure. SSAISD budgeted the most per student on instruction compared to its peer districts.

Exhibit A–62 compares SSAISD with the state for operating expenditures. In 2003–04, SSAISD budgeted 57.3 percent of its operating expenditures for instruction compared to the state average of 56.6 percent.

The district insures itself against losses through the Texas Association of Public Schools Property and Liability Fund. **Exhibit A–63** presents the coverage for property, computers, crime, general liability, educators' legal liability, and automobile liability.

The district also provides athletic/student accident insurance for students involved in University Interscholastic League (UIL) activities at a cost of $54,176 annually. The district provides a contribution of $225 per month toward health insurance coverage for all employees, except part time employees, through Humana, and employees may add dependents to the coverage at their cost. The district's insurance committee selected the policy through the annual bid process. The district has used Humana since 1996. The committee is made up of representatives of each school and department. Cancer, dental, life, and disability insurances are available to employees at their expense.

The 2001 Legislature enacted Senate Bill 218, which requires the implementation of a financial accountability rating system. In compliance with this mandate, TEA established the School Financial Integrity Rating System of Texas (School FIRST). The School FIRST rating system begins a transitional implementation for 2002–03 with preliminary and final paper reports to each district and its regional education service center. SSAISD received a superior achievement rating on the 2003 School FIRST accountability program. SSAISD was rated favorably on 20 of the 21 criteria in the system. SSAISD did not rate favorably on one criteria because its fund balance exceeded optimum fund balance levels.

During the fiscal year ended August 31,2002, SSAISD adopted the reporting model mandated by

Statement No. 34 "Basic Financial Statements and Management's Discussion and Analysis for State and Local Governments," of the Governmental Accounting Standards Board (GASB 34). Under this new basis of reporting, capital assets are subject to depreciation. Under the previous reporting model, fixed capital assets were reported at cost without depreciation. Also, the concept and terminology of "fund balance" has been superseded by the concept of "net assets."

The district uses the accounting software from Region 20. The software is capable of generating reports for the general ledger, subsidiary ledgers, and budget-to-actual expenditure reports. The reports used by the district include budget-to-actual reports include expenditures, encumbrances, and budget balances.

SSAISD has a business procedures manual that is updated annually. The manual contains information on several accounting processes for end users, including: reporting work related injuries, budget change requests, how to read monthly financials, processing invoices for payment, reporting time and absences, and procedures for fixed assets. The manual is provided to the schools and departments at an annual training session.

The district's monthly financial reports provided to the board include a summary financial statement for the general fund and each sub-fund of the general fund. The food service fund is a sub-fund of the general fund. These summary financial statements are in the same format as the annual external audit. The financial statements also include a one-line summary for revenues in all funds that present revenue budgeted, revenue realized, and revenue balance. A one-line summary is also presented for expenditures in all funds that shows budget allocation, outstanding encumbrances, expenditures to date and budget balance. The monthly financial report also includes detailed information for each fund on revenues and expenditures, and the check register for the month.

Cash and investments must be safeguarded against the risk of loss by holding cash in accounts guaranteed by the Federal Deposit Insurance Corporation (FDIC). For amounts more than the FDIC coverage, the institution should provide a depository bond or pledge securities to the district in an amount equal to or greater than the amount more than FDIC coverage. Bank One pledges securities held in safekeeping by the Federal Reserve Bank of Chicago for deposits in excess of FDIC coverage.

Texas school districts must comply with the Texas Education Code (TEC), Chapter 45, and Subchapter

G in the selection of a depository bank. SSAISD renewed its depository agreement with Bank One for the 2003–05 biennium in accordance with the TEC. The original depository contract was the result of the district's bid for depository services in 2000–01. The district received four bids and selected Bank One based on the fee structure and interest rates.

All bank accounts maintained at Bank One are consolidated for analysis purposes and are part of a compensating balance agreement. This agreement provides an earnings credit on the balance in the accounts. If the balance in the accounts is sufficient to generate enough credit, the district does not pay the bank charges for maintaining the accounts described in the depository agreement. Beginning in June 2004, if the credit generated from the balances is greater than the bank charges, the credit is rolled forward on a quarterly basis and is used to offset any negative charges for the quarter. The credit is re-set each quarter. On August 31, 2003, the earnings credit rate was .97 percent that was above the three month T-Bill at .95 percent and slightly below TexPool at 1.04 percent.

In April 2004, the district maintained 55 bank accounts at Bank One. Of these, the business office uses 19 accounts to segregate cash balances of various funds. These accounts are reconciled by the bookkeepers on a monthly basis. The April 2004 reconciliations for these accounts were provided to the review team on May 14, 2004. The schools and adult community education use the remaining 36 accounts for activity funds. The secretaries at the schools reconcile these accounts monthly and the reconciliations and accounting records are submitted to the general accountant monthly for review. The review team received March or April 2004 reconciliations for all of these accounts on May 14, 2004.

The district complies with all provisions of the Public Funds Investment Act (PFIA). The PFIA, Chapter 2256 of the Texas Government Code, governs the investment of governmental funds. SSAISD meets theses requirements with their investment policy, an investment strategy approved by the board, an annual review of the policy and strategy by the board, investment officers designated by the board, investment policy presented to and acknowledged by companies, an annual compliance audit, investment officers attending required training, and investment reports submitted to the board quarterly and annually.

SSAISD has diversified its investments in public funds investment pools and government agencies and securities. The district also maintains an overnight sweep account at Bank One. This account

is used to invest funds in excess of the set limit in checking accounts on an overnight basis. The funds are returned to the checking account with interest the next business day. **Exhibit A–64** presents the district's investment balances in February 2004.

Exhibit A–65 presents the investments by fund. Within each fund the investments are diversified between investment types.

Budget preparation and administration are important aspects of overall district operations. Providing adequate resources for programs within the restraints of available funding sources presents administrators with a significant challenge. The executive director for Business and Finance Services is responsible for estimating the state and local revenue for the budget. The state funding template is used to estimate state revenue and the current year property values are used for the initial estimate of local revenue at a 97.5 percent collection rate. As preliminary taxable values become available, the revenue estimates are updated. When the certified taxable values are available in July, the revenue estimates are finalized. The district also uses a consultant to provide four-year projections based on several different revenue and expenditure assumptions. This information is presented to the board at one of the August budget workshops.

SSAISD uses per pupil allocations based on the preceding year's average daily attendance to allocate funds to the schools in the budget process. The school administration and the site-based decision-making (SBDM) committee allocate the funds to the appropriate accounts based on the needs of the school. The funds allocated are linked to the campus improvement plan developed by the SBDM committee. Personnel units are allocated to the schools based on a pupil to teacher ratio. Other administrative, professional, and clerical positions are allocated based on the total number of students at the school.

Departments receive the same allocation as the prior year and must allocate the funds based on the department's current needs. The information provided to the departments includes the current budget, expenditures for the current year, a blank column for their request, and a fourth column representing a 10 percent reduction in their allocation.

Both schools and departments return their budgets and the bookkeepers input the information into the REGION 20 budget development program. Once the information is input from the schools and departments, the software compiles the information into a preliminary budget.

CHAPTER NINE
FOOD SERVICES

SSAISD participates in the National School Lunch, School Breakfast, and After School Snack and Summer Feeding programs. The Texas Department of Agriculture (TDA) administers these federal programs for all Texas schools. The district also has a catering program and has snack bars in its secondary schools.

SSAISD's Food Services Department serves more than two million meals each year. **Exhibit A–66** shows the number of meals served from 2001–02 through April 2004.

The district has a closed campus policy, a policy prohibiting students from leaving school grounds for meals, for all schools. Meals are prepared and served to students in 10 elementary schools, three middle schools, and two high schools. Meals for the alternative schools are prepared at Kazen and Dwight Middle Schools and are served in the satellite kitchen at the alternative schools. The high school cafeterias have theme lines that include regular menu selections, pizza and burgers and healthy choices. South San Antonio High School also has the TexMex Café line. The middle schools have the standard menu lines and limited snack bars. Elementary cafeterias have standard menu lines and sell approved snacks.

SSAISD uses the AccuSeries™ point of sale (POS) system to track meal receipts at all schools. The cashiers at all schools use the system to count the reimbursable meals and to track snack sales. At the high schools, students enter their identification numbers on key-pads.

Funding sources for SSAISD's food service operations include: adult meal payments, federal reimbursements, a la carte sales, and catering fees. Federal reimbursements are the largest revenue source. **Exhibit A–67** compares the federal revenue trends for SSAISD and its peer districts selected for this review: Edgewood, Harlandale, Mercedes, and Roma Independent School Districts.

Mercedes ISD had the largest percentage increase in federal revenues with 44.2 percent over the five-year period. SSAISD ranked third in percentage increase at 18.1 percent. Its growth was slightly less than the peer average of 20.8 percent.

Food service operations are expected to be self-supporting. When this does not occur, the operations must be subsidized from the general operating fund, which diverts funding from instructional activities. **Exhibit A–68** shows that SSAISD's Food Services

Department operations were profitable in two of the years from 2000–01 through 2002–03. The department recorded a loss in 2001–02 as a result of a planned capital outlay for the purchase and installation of equipment for South San Antonio High School and Benavidez Elementary School. The district renovated the high school's cafeteria and newly constructed the elementary school cafeteria using funds from the Food Services Department fund balance. Revenues have increased by 11.6 percent and expenditures have increased by 13.7 percent during the same time period.

To reduce waste, SSAISD serves students using the "offer-versus-serve" method. Under "offer-versus-serve," students are not served all menu items. Instead, students are offered required menu items and must select a minimum number of the required items to count as a reimbursable meal under the NSLP and SBP. Elementary and secondary menus are different and SSAISD uses a cycle menu, a menu that repeats items during a cycle or period of time. The elementary schools have a six-week cycle menu and the secondary schools have a four-week cycle menu. Menu adjustments may occur depending on the timing and amounts of donated commodities received.

The assistant director of Food Services has a degree in nutrition and is responsible for performing nutritional analysis of SSAISD menus. The district mostly uses the conventional food preparation method. The conventional method includes the preparation of some foods from raw ingredients on the premises, the use of some bakery bread and prepared pizza, and the washing of dishes.

The district has a food service warehouse located adjacent to the Food Services Department offices. The warehouse is used to temporarily store commodities and paper products until they are distributed to individual cafeterias. The Food Services Department has a refrigerated delivery truck to deliver items once a week to individual schools. Vendors also make weekly deliveries to schools.

As shown in **Exhibit A–69**, the director of Food Services heads the Food Services Department and reports to the administrator for Support Services. The director of Food Services, hired by SSAISD in 2002, has a bachelors degree and worked previously for a food services management company.

The director of Food Services supervises five central office and warehouse staff, including the assistant director, the supervisor, the food service distribution coordinator, the food service warehouse foreman, and one clerk. The position also supervises cafeteria managers at each of the district's school cafeterias.

The assistant director and supervisor also provide supervisory support to the director of Food Services by reviewing cafeterias to monitor temperature, food quality, and serving. The porters are dedicated food service custodians that were implemented in 2003–04 to maintain cleanliness and sanitation in the cafeterias as well as in the food service preparation areas.

In 2003–04, there are 136 cafeteria staff at 16 school cafeterias. **Exhibit A–70** shows the department staffing by cafeteria.

Most cafeteria staff are full-time and work an average of 6.9 hours per day. As shown in **Exhibit A–70**, there is a manager at each cafeteria and a manager trainee at two elementary and four secondary schools. The largest number of staff work at the secondary schools.

SSAISD manages its cafeterias' productivity using a Meal per Labor Hour (MPLH) formula. MPLH, a food services productivity standard, is the number of meal equivalents served in a given period divided by the total hours worked during that period. SSAISD's meal equivalents are lunches plus an equivalent number of breakfasts, snacks, and a la carte sales.

Exhibit A–71 compares SSAISD's April 2004 MPLH to industry standards for the conventional method of preparation. The conventional system was used because it is the method most used by SSAISD kitchens. Conventional preparation requires more staff than convenience preparation because it uses fewer processed items with more items, such as raw vegetables and homemade breads, prepared from scratch. SSAISD calculates its MPLH by dividing the average meal equivalents served by the average hours worked.

As shown in **Exhibit A–71**, industry standards were adjusted at the high schools because of poor cafeteria design and to reflect the district's decision to increase the number of serving lines to speed service to students and offer more variety. These factors affect productivity, require additional staffing, and reduce the district MPLH.

As shown in **Exhibit A–71**, the district average slightly exceeds the overall industry MPLH standard, and most cafeterias meet or exceed the standard.

In 2003–04, SSAISD Food Services Department had an operating budget of approximately $5.3 million. **Exhibit A–72** compares SSAISD's food services budget with the budgets of its peer districts.

When compared to its peers, SSAISD ranks in the middle in most categories. SSAISD has the third highest food service budget, behind Harlandale ISD and Edgewood ISD. Its salary and benefit

expenditures as a percent of budget ranks third behind Harlandale ISD at 49.8 percent and Edgewood ISD at 46.9 percent. SSAISD's food and supplies expenditure as a percent of total budget (43.1 percent) is the lowest of all districts. SSAISD's expenditures per student ranks third among the five districts and are roughly 9 percent higher than Edgewood ISD, which had the lowest expenditures per student at $494.

SSAISD is complying with the Foods of Minimal Nutritional Value (FMNV) policy. There were no FMNV items stocked in vending machines and the vending machines were not located in school food service areas.

SSAISD has implemented theme lines and menus with a variety of choices to increase student participation. Theme lines are similar to food courts and have been implemented at South San Antonio and West Campus high schools. The lunch theme lines at South San Antonio High School include: two daily menu selections, a pizza line, a burger line, Bobcat snack bar, TexMex Café and a healthy choice selection consisting of soup, salad, sandwiches, and baked potatoes. West Campus has the same theme lines as South San Antonio High School except for the TexMex Café. Students at the middle and elementary schools can select from either two offered entrees or the healthy choice menu.

Similarly, SSAISD offers two menu choices for breakfast, except for the three schools that offer breakfast in the classroom. The director of Food Services said that one reason that the district did not offer a districtwide breakfast in the classroom program was because it limited menu choices.

Exhibit A–73 compares SSAISD breakfast and lunch participation rates to its peers.

SSAISD ranks first among the peers in lunch participation for all three years. It ranks fourth among the peers in breakfast participation, but does not offer a districtwide breakfast in the classroom program like peers such as Mercedes does.

SSAISD uses various methods to evaluate menu offerings and food quality. The student advisory group, started in 2002–03 to evaluate food service, facilities and transportation, has a representative from each school and meets monthly. The group discusses food choices and what is working. Food Services Department staff attends the meetings to hear feedback. Cafeteria managers monitor participation rates to see what menu items are popular. Each cafeteria prepares a test tray each day that can be used to monitor quality and portion size of meals.

The review team surveyed parents, teachers, principals, and students to ask questions about food quality, service and environment. As shown in **Exhibit A–74**, opinions on food appearance and taste varied widely. Principals rated appearance and taste the highest at 73.1 percent, followed by teachers at 50 percent, parents at 30.7 percent and students at 18 percent. All groups were more positive when asked about food temperature. Responses to questions about service time and length of time to eat were mixed, and responses to questions about staff friendliness and cafeteria cleanliness were very positive.

CHAPTER TEN
STUDENT TRANSPORTATION

Chapter 34 of the Texas Education Code (TEC) authorizes, but does not require, Texas school districts to provide transportation for students in the general population between home, school, career and technology training locations, and extracurricular activities. The federal Individuals with Disabilities Education Act (IDEA) requires a school district to provide transportation for students with disabilities if the district also provides transportation for students in the general population, or if students with disabilities require transportation to special programs. In 2003–04, SSAISD provided 21 routes: 12 regular program routes and nine special program routes. In 2003–04, the district has 27 driver and nine bus aide positions to operate routes.

Texas school districts receive state reimbursement for transporting regular, special, and career and technology education (CATE) program students. The Legislature sets funding rules, and the Texas Education Agency (TEA) administers the program. TEA requires each school district receiving state reimbursement to provide two annual school transportation reports: the School Transportation Route Services report and the School Transportation Operations report. The Route Services report documents miles traveled and number of riders by program and subprogram. The Operations report documents total miles, costs, and fleet data.

State funding for transporting regular program students is limited to those students living two or more miles from their school. The state does not reimburse districts for transporting students living within two miles of their school unless they face hazardous walking conditions on the way to school. The state will reimburse districts for transporting students on hazardous routes within two miles of school; however, these reimbursements may not exceed 10 percent of the total annual reimbursement for transporting two-or-more-mile students. A school district must use local funds to pay for

transportation costs the state reimbursement does not cover.

For the regular program, the state reimburses districts for qualifying transportation expenses based on a linear density ratio— the average daily number of regular program students transported on standard routes divided by the daily route miles driven. Standard route miles and riders do not include miles or riders for alternative, bilingual, desegregation, magnet, parenting, year round, or hazardous area service. TEA uses this ratio to assign the maximum per-mile allotment a district can receive. **Exhibit A–75** shows the linear density groups and the related allotment per mile.

Exhibit A–76 shows the linear densities for SSAISD and a peer group of four Texas school districts. Data for 2002–03 are used throughout this chapter because not all TEA transportation data for 2003–04 are reported until December 2004.

In 2002–03, SSAISD had the highest linear density of the peer districts and was in the highest linear density group. The latter entitled the district to a reimbursement of $1.43 per route mile for regular program miles. The district's actual operations cost (total annual costs less debt service and capital outlay) in 2002–03 was $3.18 per odometer mile. Odometer miles are all miles traveled, including mileage for maintenance, extracurricular miles, and miles driven to and from a route, known as deadhead.

The Legislature sets the allotment rate for special programs transportation. All transportation for special program students, except certain extracurricular trips, is eligible for state reimbursement at $1.08 per route mile. In 2002–03, SSAISD's actual cost for special program transportation was $2.20 per odometer mile.

CATE program reimbursement is based on the cost for regular program miles for the previous fiscal year, as reported in the TEA School Transportation Operations report. CATE program miles are divided into regular and special subprograms. In 2002–03, SSAISD received a reimbursement of $2.67 per reimbursable route mile.

Reimbursable route miles are defined as the verified mileage for service between eligible students' residences and their respective schools of regular attendance, beginning at the first school served and ending at the last school served. SSAISD operated 88,572 regular program reimbursable route miles, 91,317 special program reimbursable route miles, and 8,418 CATE program reimbursable route miles in 2002–03.

Exhibit A–77 compares SSAISD's annual riders, total annual odometer miles, and number of total buses to peer districts for 2002–03. Annual riders include students in the CATE program if applicable. Compared to the other peers, SSAISD carries a larger number of regular program students using fewer vehicles. For special program transportation, SSAISD is similar to Harlandale, a neighboring San Antonio district, in terms of ridership, mileage, and buses.

Exhibit A–78 compares 2002–03 transportation cost efficiency and effectiveness indicators for SSAISD and its peer districts. Cost per odometer mile is determined by dividing total annual operations cost (less debt service and capital outlay) by total annual odometer miles. Cost per rider is determined by dividing total annual operations cost (less debt service and capital outlay) by total annual riders. Total annual riders are determined by multiplying average daily riders by 180 school days.

The SSAISD cost per regular program odometer mile is 12 percent higher than the peer average, and the cost per regular program rider is 69 percent lower. The SSAISD cost per special program odometer mile is 38 percent lower than the peer average, and the cost per special program rider is 46 percent lower. The high cost efficiency and effectiveness of SSAISD transportation is due to the small service area and staggered bell times, which allows the same drivers to make multiple trips each morning and afternoon.

Exhibit A–79 compares service effectiveness, or productivity, indicators for SSAISD and peer districts using route miles with deadhead. Route miles are all miles operated to provide student transportation between home and school and for CATE programs. Route miles are not limited to reimbursable route miles. The riders per route mile with deadhead are determined by dividing total annual riders by total annual route miles with deadhead. Total annual riders are determined by multiplying average daily riders by 180 school days. The riders per bus are determined by dividing average daily riders by the total number of buses.

SSAISD regular program riders per route mile with deadhead miles are 200 percent higher than the peer average, and the number of riders per bus is 160 percent higher than the peer average. SSAISD special program riders per route mile with deadhead miles are 38 percent higher than the peer average, and the number of riders per bus is 25 percent higher. The high service effectiveness of SSAISD transportation is due to the small service area and staggered bell times, which allows drivers to make multiple trips each morning and afternoon.

A five-year history of transportation cost data for SSAISD, provided by TEA, is shown in **Exhibit A–80.**

Regular program operation costs decreased 16 percent from 1998–99 to 2001–02, and then increased 17 percent in 2002–03 to previous levels. Regular program odometer miles experienced a similar decrease in 1999–2001, with odometer miles falling from more than 150,000 miles to 130,000, then increasing again to more than 150,000 odometer miles in 2001–02 and 2002–03. Annual regular program ridership has remained steady, increasing only 4 percent from 1998–99 to 2002–03.

Special program operation costs varied during the five-year period. Overall, special program operation costs increased 23 percent from 1998–99 to 2002–03. As with regular program odometer miles, special program odometer miles fell in1999–2001, from more than 144,000 to 113,234. Odometer mileage recovered in the following two years, for an overall 7 percent increase in special program odometer miles during the five-year period. Special program ridership has decreased by 10 percent overall during the five-year period.

Exhibit A–81 summarizes five-year SSAISD transportation operation costs by object of expenditure, as defined by TEA in the instructions for the annual TEA School Transportation Route Services report.

Total operation costs increased 7 percent from 1998–99 to 2002–03. Salaries and benefits actually experienced a slight decrease of 4 percent during the five-year period. However, purchased services, supplies and materials, and other expenses increased significantly. Overall, these three areas make up 23 percent of total costs. The director of Plant Operations did not offer an explanation for the increases in these areas.

SSAISD has instituted staggered bell times, with elementary schools in session from 7:45 AM to 3:00 PM, high schools in session from 7:50 AM to 3:20 PM, and middle schools in session from 8:05 AM to 3:35 PM. As a result of staggered bell times, all of the regular program routes are able to operate three trips each morning and afternoon: one trip for elementary school students, one trip for high school students, and one trip for middle school students.

The Transportation Department maintains the school transportation and general services fleets. Based on fleet inventory lists dated April 2004, the school bus fleet consists of 29 buses. The general services fleet consists of 59 pick-up trucks, vans, and cars. The Transportation Department is also responsible for maintaining small engines, such as lawn mowers, and heavy equipment, such as tractors.

Three of the 29 buses are used for life skills and parenting trips. These buses are maintained by Transportation, but are operated and managed by employees in the life skills and parenting programs. Excluding these three buses, the Transportation Department uses 26 buses to operate 21 routes, for a 20 percent spares ratio. This spares ratio is adequate given the small size of the SSAISD bus fleet. A summary of the bus fleet is shown in **Exhibit A–82**. The 26 route buses are an average of seven years old.

In addition to the director of Plant Operations, the Transportation Department consists of a secretary, three full-time mechanics, 27 drivers, and nine bus aides. The secretary is responsible for answering the telephone, billing, logging mileage and ridership, dispatching, filing, and helping schedule extracurricular trips. The mechanics are responsible for maintaining the school bus and general service fleets. Vehicle maintenance is performed in a shop with two interior maintenance bays. Mechanics also work on buses under a partially covered outdoor area next to the maintenance shop. The parking lot is paved and fenced.

Of the 27 driver positions, four positions are vacant. Of the remaining 23 drivers, two drivers work part time as mechanic helpers, one driver works as a clerk, and one driver is a substitute driver. The driver/mechanic helpers provide assistance to the mechanics for four hours a day. The driver/clerk assists the director of Plant Operations with all aspects of daily transportation operations. She oversees driver pullout every morning to ensure all routes are covered, processes payroll for the department, schedules extracurricular trips, and performs routing and scheduling.

A Maintenance Department employee responsible for integrated pest management also assists the Transportation Department by dispatching, periodically riding along with drivers to assess performance, and ordering parts.

Fueling is done using a mobile fueling distributor and fuel cards. The fueling distributor travels to the bus lot three days a week and fuels buses and other vehicles on site. Drivers use a fuel card that is checked out from the secretary by vehicle if a bus or vehicles needs fuel on any non-scheduled day.

The district contracts with a local charter provider to operate athletic trips that conflict with regular routes. Procurement of charter services is done through a formal RFP process. The RFP lists specific trips the winning bidder is expected to perform and requests a price quote for each trip. The most recent charter service was under contract to provide 24 athletic trips during the Spring 2004 semester at a cost of $9,625.

EXHIBIT A–1
DEMOGRAPHIC CHARACTERISTICS OF STUDENTS
SSAISD, PEER DISTRICTS, REGION 20, AND THE STATE
2002–03

DISTRICT	STUDENT ENROLLMENT	RACIAL/ETHNIC PERCENT				PERCENT ECONOMICALLY DISADVANTAGED
		AFRICAN AMERICAN	HISPANIC	ANGLO	OTHER	
Edgewood ISD	13,153	1.6%	97.1%	1.1%	0.1%	96.0%
Harlandale ISD	14,365	0.6%	94.6%	4.7%	0.2%	88.9%
Mercedes ISD	5,250	0.3%	98.9%	0.7%	0.0%	91.9%
Roma ISD	6,167	0.0%	99.7%	0.3%	0.0%	89.8%
South San Antonio ISD	10,018	1.7%	94.8%	3.0%	0.5%	90.7%
Region 20	343,821	7.0%	64.9%	26.6%	1.5%	61.6%
State	4,239,911	14.3%	42.7%	39.8%	3.2%	51.9%

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

EXHIBIT A–2
SSAISD SCHOOL ACCOUNTABILITY RATINGS
1997–98, 2001–02, AND 2003–04

SCHOOL	1997–98 ACCOUNTABILITY RATINGS	2001–02 ACCOUNTABILITY RATINGS	2003–04 ACCOUNTABILITY RATINGS
South San Antonio High School	*Acceptable*	*Recognized*	*Acceptable*
South San Antonio High School West	*Acceptable*	*Recognized*	*Acceptable*
Competency Based High School	*AE: Peer Review*	*—*	*—*
Alternative School	*AE: Acceptable*	*—*	*—*
Competency Based High School AEP	*—*	*AE: Acceptable*	*Not Rated*
Dwight Middle School/Special Education	*Acceptable*	*—*	*—*
Dwight Middle School	*—*	*Acceptable*	*Acceptable*
Alan B. Shepard Middle School	*Acceptable*	*Acceptable*	*Acceptable*
Abraham Kazen Middle School	*Acceptable*	*Acceptable*	*Acceptable*
Athens Elementary	*Acceptable*	*Recognized*	*Acceptable*
Hutchins Elementary	*Recognized*	*Exemplary*	*Recognized*
Kindred Elementary	*Acceptable*	*Recognized*	*Recognized*
Palo Alto Elementary	*Acceptable*	*Exemplary*	*Acceptable*
Price Elementary	*Acceptable*	*Exemplary*	*Acceptable*
Roy Benavidez Elementary	*Opened 2002–03*	*Opened 2002–03*	*Recognized*
Royalgate Elementary	*Acceptable*	*Acceptable*	*Acceptable*
Five Palms Elementary/Special Education	*Acceptable*	*—*	*—*
Five Palms Elementary	*—*	*Recognized*	*Acceptable*
Neil Armstrong Elementary	*Recognized*	*Recognized*	*Acceptable*
Antonio Olivarez Elementary	*Exemplary*	*Exemplary*	*N/A*
Miguel Carrillo Jr Elementary	*Acceptable*	*Exemplary*	*Recognized*

SOURCE: Texas Education Agency, District Accountability Summaries, 1997–98, 2001–02, and 2003–04.

EXHIBIT A–3
STUDENTS TESTED/NOT TESTED ON TEXAS ASSESSMENT
OF KNOWLEDGE AND SKILLS (TAKS)
SSAISD, PEER DISTRICTS, REGION 20, AND THE STATE
2002–03

	PERCENT OF STUDENTS TESTED OR NOT TESTED ON TAKS					
	STUDENTS TESTED			STUDENTS NOT TESTED		
	PERFORMANCE NOT COUNTED		PERFORMANCE COUNTED (ACCOUNTABILITY SUBSET)	TOTAL NOT TESTED	LEP EXEMPT	ARD EXEMPT
DISTRICT	MOBILE SUNSET	SDAA				
Edgewood ISD	5.4%	7.9%	77.6%	9.1%	1.1%	4.2%
Harlandale ISD	5.0%	8.0%	80.5%	6.5%	0.6%	3.4%
Mercedes ISD	5.5%	3.6%	86.0%	4.9%	1.5%	1.4%
Roma ISD	4.6%	3.7%	87.3%	4.5%	0.1%	0.7%
South San Antonio ISD	5.5%	5.5%	83.3%	5.8%	2.7%	1.5%
Region 20	5.7%	5.0%	84.0%	5.4%	0.6%	2.3%
State	4.9%	4.8%	85.2%	5.1%	1.1%	1.7%

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

EXHIBIT A–4
PERCENT OF STUDENTS GRADUATING, RECEIVING A GED,
CONTINUING IN HIGH SCHOOL, OR DROPPING OUT OF HIGH SCHOOL
SSAISD, REGION 20, THE STATE, SOUTH SAN ANTONIO HIGH SCHOOL,
AND SOUTH SAN ANTONIO HIGH SCHOOL WEST
CLASS OF 1999 THROUGH CLASS OF 2002

GRADUATING CLASS	STATE	REGION 20	SSAISD	SOUTH SAN ANTONIO HIGH SCHOOL	SOUTH SAN ANTONIO HIGH SCHOOL WEST
Class of 2002					
Graduated	82.8%	80.2%	71.6%	75.4%	81.2%
Received GED	4.1%	4.5%	4.2%	4.1%	2.2%
Continued HS	8.0%	9.2%	15.6%	9.7%	15.2%
Dropped Out	5.0%	6.2%	8.6%	10.7%	1.4%
Class of 2001					
Graduated	81.1%	78.2%	76.5%	79.2%	85.0%
Received GED	4.8%	5.2%	2.3%	2.1%	0.7%
Continued HS	7.9%	8.6%	10.6%	7.4%	6.8%
Dropped Out	6.2%	8.0%	10.5%	11.2%	7.5%
Class of 2000					
Graduated	80.7%	78.0%	73.6%	77.0%	86.1%
Received GED	4,8%	5.0%	2.2%	1.9%	1.4%
Continued HS	7.3%	8.0%	9.2%	3.7%	4.2%
Dropped Out	7.2%	9.0%	15.0%	17.4%	8.3%
Class of 1999					
Graduated	79.5%	76.5%	76.5%	77.2%	88.8%
Received GED	4.0%	3.8%	2.3%	1.4%	0.0%
Continued HS	8.0%	9.5%	6.2%	4.5%	3.7%
Dropped Out	8.5%	10.2%	15.1%	16.9%	7.5%

SOURCE: Texas Education Agency, AEIS, 1999–2000 and 2002–03.

EXHIBIT A–5
PERCENT OF STUDENTS GRADUATING AND DROPPING OUT
CLASS OF 2000, 2001, AND 2002
SSAISD, PEER DISTRICTS, REGION 20, AND STATE

| DISTRICT | CLASS OF 2002 | | CLASS OF 2001 | | CLASS OF 2000 | |
	PERCENT GRADUATES	PERCENT DROP OUTS (4–YEAR)	PERCENT GRADUATES	PERCENT DROP OUTS (4–YEAR)	PERCENT GRADUATES	PERCENT DROP OUTS (4–YEAR)
Mercedes ISD	84.8%	4.5%	86.2%	3.0%	80.0%	8.8%
Harlandale ISD	79.9%	4.5%	76.9%	5.1%	77.3%	5.8%
Roma ISD	76.0%	9.2%	78.6%	8.2%	82.0%	9.2%
South San Antonio ISD	71.6%	8.6%	76.5%	10.5%	73.6%	15.0%
Edgewood ISD	69.7%	10.5%	64.9%	12.3%	61.8%	19.5%
Region 20	80.2%	6.2%	78.2%	8.0%	78.0%	9.0%
State	82.8%	5.0%	81.1%	6.2%	80.7%	7.2%

SOURCE: Texas Education Agency, AEIS, 2000–01 and 2002–03.

EXHIBIT A–6
PERCENT GRADUATES AND DROPOUTS BY STUDENT GROUP
SSAISD AND PEER DISTRICTS
CLASS OF 2002

DISTRICT	STATUS	ALL STUDENTS	AFRICAN AMERICAN	HISPANIC	ANGLO	ECONOMICALLY DISADVANTAGED	AT–RISK
Mercedes ISD	Graduates	84.8%	*	84.3%	100.0%	83.4%	76.5%
	Dropouts	4.5%	*	4.6%	0.0%	4.4%	6.8%
Harlandale ISD	Graduates	79.9%	*	79.2%	91.1%	82.3%	72.1%
	Dropouts	4.5%	*	4.5%	1.8%	3.8%	5.3%
Roma ISD	Graduates	76.0%	*	75.8%	*	77.7%	72.6%
	Dropouts	9.2%	*	9.3%	*	8.9%	8.5%
South San Antonio ISD	Graduates	71.6%	87.5%	71.4%	68.2%	70.9%	57.3%
	Dropouts	8.6%	0.0%	8.9%	4.5%	8.6%	11.5%
Edgewood ISD	Graduates	69.7%	68.8%	69.7%	71.4%	71.9%	64.5%
	Dropouts	10.5%	6.3%	10.3%	28.6%	8.8%	11.4%

SOURCE: Texas Education Agency, Secondary School Completion and Dropouts in Texas Public Schools, 2003.
* Due to small numbers, data are not reported to protect student anonymity.

EXHIBIT A–7
SSAISD PASSING RATES ON TAAS AND TAKS
READING, WRITING, MATHEMATICS, AND ALL TESTS
1999–2000 THROUGH 2002–03

| YEAR | READING | | WRITING | | MATHEMATICS | | ALL TESTS | |
	SSAISD	STATE	SSAISD	STATE	SSAISD	STATE	SSAISD	STATE
TAAS								
1999–2000	85.5%	87.4%	87.8%	88.2%	84.8%	87.4%	75.7%	79.9%
2000–01	84.2%	88.9%	88.7%	87.9%	87.2%	90.2%	77.2%	82.1%
2001–02	88.2%	91.3%	87.0%	88.7%	90.1%	92.7%	80.8%	85.3%
TAKS								
2002–03*	80.6%	85.6%	85.3%	86.3%	67.4%	77.8%	55.1%	67.4%
2002–03**	73.7%	80.2%	81.7%	82.9%	55.6%	67.9%	43.8%	57.4%

SOURCE: Texas Education Agency, AEIS, 1999–2000 and 2002–03.
* 2 SEM below panel recommendations. This figure represents the passing standard for 2002–03.
** 1 SEM below panel recommendations. This figure represents the passing standard for 2003–04.

EXHIBIT A–8
2002–03 TAKS PASS RATES*
READING, WRITING, MATHEMATICS, AND ALL TESTS
SSAISD, PEER DISTRICTS, REGION 20, AND STATE

DISTRICT	ENGLISH LANGUAGE ARTS	READING	MATH	WRITING	SCIENCE	SOCIAL STUDIES	ALL TESTS
Harlandale ISD	78.0%	85.4%	73.3%	91.7%	61.5%	90.5%	63.9%
South San Antonio ISD	49.5%	80.6%	69.0%	85.3%	62.2%	85.1%	57.3%
Mercedes ISD	53.9%	75.0%	67.4%	82.5%	52.7%	82.2%	55.1%
Edgewood ISD	59.8%	76.6%	64.6%	80.8%	52.7%	84.4%	52.2%
Roma ISD	50.9%	65.4%	65.3%	73.4%	44.4%	75.7%	49.4%
Region 20	70.1%	84.7%	76.4%	85.8%	70.6%	89.7%	66.8%
State	72.8%	85.6%	78.6%	86.3%	71.7%	90.1%	69.1%

SOURCE: Texas Education Agency, AEIS, 2002–03.
* 2 SEM below panel recommendations. This figure represents the passing standard for 2002–03.

EXHIBIT A–9
PERCENT OF SSAISD STUDENTS TESTED
MEETING TAKS STANDARD BY SUB-TEST AND GRADE
2002–03

GRADE	PERCENT OF STUDENTS TESTED MEETING TAKS STANDARD*						
	READING	MATH	WRITING	ENGLISH LANGUAGE ARTS	SCIENCE	SOCIAL STUDIES	ALL TESTS
Grade 3	88.9%	93.4%	*	*	*	*	84.8%
Grade 4	83.6%	86.8%	83.0%	*	*	*	71.3%
Grade 5	76.3%	88.6%	*	*	73.8%	*	61.3%
Grade 6	77.2%	69.1%	*	*	*	*	59.3%
Grade 7	80.7%	60.2%	87.3%	*	*	*	54.9%
Grade 8	81.7%	54.8%	*	*	*	91.6%	53.2%
Grade 9	74.2%	38.0%	*	*	*	*	36.8%
Grade 10	*	47.2%	*	49.5%	47.1%	77.5%	25.3%
Grade 11	*	46.8%	*	56.9%	47.9%	85.2%	29.7%
All Grades	80.6%	67.4%	85.3%	52.6%	58.7%	85.1%	55.1%

SOURCE: Texas Education Agency, AEIS, 2002–03.
* 2 SEM below panel recommendations. This represents the passing standard for 2002–03.

EXHIBIT A–10
PERCENT OF SSAISD STUDENTS TESTED
MEETING TAKS STANDARD BY SUB–TEST AND GRADE
2003–04

GRADE	PERCENT OF STUDENTS TESTED MEETING TAKS STANDARD*						
	READING	MATH	WRITING	ENGLISH LANGUAGE ARTS	SCIENCE	SOCIAL STUDIES	ALL TESTS
Grade 3	89%	92%	*	*	*	*	NA
Grade 4	79%	80%	91%	*	*	*	69%
Grade 5	71%	77%	*	*	64%	*	53%
Grade 6	76%	66%	*	*	*	*	59%
Grade 7	77%	53%	92%	*	*	*	48%
Grade 8	79%	37%	*	*	*	83%	35%
Grade 9	77%	38%	*	*	*	*	38%
Grade 10	*	37%	*	56%	43%	81%	25%
Grade 11	*	66%	*	84%	66%	95%	49%

SOURCE: Texas Education Agency, Texas Assessment of Knowledge and Skills, Summary Report, May 2004.
1 SEM below panel recommendations. This represents the passing standard for 2003–04.
NA = not available.

EXHIBIT A–11
PERCENT OF SSAISD STUDENTS TESTED
MEETING TAKS STANDARD AT 1 SEM BY SUB–TEST AND GRADE
2002–03

	PERCENT OF STUDENTS TESTED MEETING TAKS STANDARD*						
GRADE	*READING*	*MATH*	*WRITING*	*ENGLISH LANGUAGE ARTS*	*SCIENCE*	*SOCIAL STUDIES*	*ALL TESTS*
Grade 3	84%	85%	*	*	*	*	NA
Grade 4	76%	77%	79%	*	*	*	NA
Grade 5	71%	78%	*	*	53%	*	NA
Grade 6	66%	54%	*	*	*	*	NA
Grade 7	73%	46%	82%	*	*	*	NA
Grade 8	74%	40%	*	*	*	83%	NA
Grade 9	64%	26%	*	*	*	*	NA
Grade 10	*	29%	*	48%	31%	66%	NA
Grade 11	*	33%	*	52%	34%	76%	NA

SOURCE: Texas Education Agency, Texas Assessment of Knowledge and Skills, Phase-In Summary Report, Spring 2003.
1 SEM below panel recommendations. This represents the passing standard for 2003–04.
NA = not available.

EXHIBIT A–12
SSAISD STUDENTS ENROLLED SPECIAL EDUCATION
NUMBER AND PERCENT OF STUDENTS BY PRIMARY DISABILITY
2003–04

DISABILITY	*NUMBER OF STUDENTS*	*PERCENT OF STUDENTS*
Auditory Impairment	37	3.3%
Autism	23	2.1%
Emotional Disturbance	119	10.7%
Learning Disability	618	55.4%
Mental Retardation	53	4.7%
Non Categorical Early Childhood	39	3.5%
Orthopedic Impairment	14	1.2%
Other Health Impairment	73	6.5%
Speech Impairment	126	11.3%
Traumatic Brain Injury	*	*
Visual Impairment	9	0.8%
Total	*	100.0%

SOURCE: SSAISD, Special Education Enrollment 2003–04, May 2004.
NOTE: Not identified per FERPA regulations.*

EXHIBIT A–13
NUMBER OF BILINGUAL/ESL STUDENTS EXITING THE PROGRAM BY GRADE LEVEL
2000–01 THROUGH 2002–03

GRADE	*2000–01*	*2001–02*	*2002–03*
Grade 2	29	9	0
Grade 3	70	51	13
Grade 4	32	17	*
Grade 5	32	19	15
Total–Elementary School	163	96	*
Grade 6	12	*	*
Grade 7	8	10	*
Grade 8	6	8	0
Total–Middle School	26	*	*
Grade 9	*	9	0
Grade 10	6	6	7
Grade 11	*	*	*
Grade 12	0	0	*
Total–High School	*	*	*

SOURCE: SSAISD, Bilingual/ESL Program Administrator, May 2004.
NOTE: Not identified per FERPA regulations.*

EXHIBIT A–14
NUMBER OF RECENT IMMIGRANTS BY GRADE LEVEL
2001–02 THROUGH 2003–04

GRADE	2000–01	2001–02	2002–03
Pre–Kindergarten	14	12	10
Kindergarten	28	10	16
Grade 1	20	22	19
Grade 2	18	14	13
Grade 3	20	16	9
Grade 4	17	13	12
Grade 5	14	9	19
Total–Elementary School	131	96	98
Grade 6	6	20	11
Grade 7	6	13	13
Grade 8	11	11	13
Total–Middle School	23	44	37
Grade 9	22	15	12
Grade 10	8	8	6
Grade 11	*	*	*
Grade 12	0	0	0
Total–High School	*	*	*

SOURCE: SSAISD, Bilingual/ESL Program Administrator, May 2004.
NOTE*: Not identified per FERPA regulations.

EXHIBIT A–15
NUMBER AND PERCENTAGE OF AT–RISK STUDENTS
SSAISD, PEER DISTRICTS, REGION 20, AND THE STATE
2002–03

DISTRICT	TOTAL ENROLLMENT	NUMBER OF AT–RISK STUDENTS	PERCENT OF AT–RISK STUDENTS
Harlandale ISD	14,365	7,337	51.1%
Edgewood ISD	13,153	8,655	65.8%
South San Antonio ISD	**10,018**	**7,765**	**77.5%**
Roma ISD	6,167	4,013	65.1%
Mercedes ISD	5,250	2,903	55.3%
Region 20	**343,821**	**150,266**	**43.7%**
State	**4,239,911**	**1,704,648**	**40.2%**

SOURCE: Texas Education Agency, Public Education Information Management System (PEIMS), 2002–03.

EXHIBIT A–16
SSAISD STATE COMPENSATORY EDUCATION FUNDED PROGRAMS
2002–03

PROGRAM	PROGRAM DESCRIPTION	2002–03 SCE FUNDING
South San Alternative School	Designated as a disciplinary alternative education program, the school serves students in grades 6–12. The program endeavors to return those students to mainstream education.	$508,564
NovaNET Program	Program is available at the Completion Center, West Campus High School, and the South San High School. Program serves students at risk of dropping out of school. Program provides self-paced individual instruction to students allowing them to recover credits as well as earn credits during the regular school day so that they can graduate on schedule.	$75,228
Counseling Program	SSAISD has a districtwide counseling program that includes prevention/intervention counselors targeting at-risk students. Counselors worked with all at-risk students in 14 schools and 70 percent at South San High School.	$901,114
Visiting Teachers and Attendance Program	Three visiting teachers and attendance clerks work with each principal and school staff to enhance regular student attendance. Visiting teachers also refer parents to social service agencies, when needed. If home visits and warnings do not correct the attendance problem, the visiting teachers file a complaint on the district's behalf with the Justice of the Peace court.	$138,055
Bilingual Teacher Assistants	The bilingual teacher assistants work with small groups or individual students. They also review the Home Language Survey of all new students, administer language assessment instruments and report results to the bilingual campus representative.	$273,036
TAKS Collaborative	The Collaborative consists of selected K–11 teachers who align the TEKS with the TAKS by developing a scope and sequence (timeline) and district assessments. SSAISD developed 45 hours of remediation classes in the four content areas for students in grades 11 and 12 who need to retake the TAKS to graduate. The TAKS Collaborative teachers identify students at-risk because of their TAKS performance. They train all teachers at the beginning of the school year to meet academic needs of these students.	$125,384
Middle School Reading Program	The program provides supplementary reading instruction to middle school students who are below level in reading. The district provides staff development to the reading and language arts middle school teachers.	$216,359
Pre-kindergarten Program	In this early intervention program, instructional aides conduct instructional activities with individual students or small groups of students.	$360,000
Secondary Summer School, Grades 9–12	The objective of the program is to increase the course passing rates and reduce dropout.	$89,174

SOURCE: SSAISD, State Compensatory Education Local Evaluation Studies for Academic Year 2002–03.

EXHIBIT A–17
SCE AND TITLE I, PART A–FUNDED TEACHERS, AND AIDES
2003–04

LEVEL	SCE		TITLE I, PART A	
	TEACHERS	AIDES	TEACHERS	AIDES
Elementary Schools	49	53	19	2
Middle Schools	21	5	6	2
High Schools	21	3	6	0
Total	**91**	**61**	**31**	**4**

SOURCE: SSAISD, Executive Director for Special Programs and Director of Accelerated Instruction, May 2004.

EXHIBIT A–18
SSAISD TITLE I FUNDED PROGRAMS
2003–04

PROGRAM	PROGRAM DESCRIPTION
Title I Non-Public School Cooperative	SSAISD participates in a consortium with ten other school districts and Region 20 providing services to more than 1,200 students in 22 non-public schools in the San Antonio area. Services include computer-based reading/English Language Arts and math small group instruction and tutoring; professional development for participating non-public teachers and administrators; and parent education opportunities. In 2002–03, 209 non-public students and 79 low-income family (LIF) students participated in the cooperative. In 2003–04, 199 non-public students and 74 LIF students from SSAISD participated in the cooperative.
Families and Schools Together (FAST)	FAST is an early intervention and prevention program for elementary school children at risk for substance abuse, school failure and juvenile delinquency. The goals are to support parents, build good family communication and help children succeed in school. The program administered by the Family Service Association of San Antonio offers an eight-week counseling program for families at school in the evenings with monthly follow-ups. SSAISD implemented the program in its elementary schools. In 2003–04, 167 families attended at least one FAST session, 126 completed the program, 471 children and 221 parents attended FAST regularly. SSAISD plans to pilot the program in a middle school in 2004–05.
Homeless Children	SSAISD provided services to 19 homeless students in 2003–04. Services included tutoring, accelerated instruction, school supplies (books) and medical/health services.
Health/Medical Services	In 2003–04, SSAISD paid for health/medical services for 66 students whose parents do not have health insurance. SSAISD contracted with local physicians and dentists. SSAISD referred students for medical, dental, vision, and prescription eyewear services.
Continuing Education for Paraprofessional	SSAISD covers tuition and books for paraprofessionals getting an associate degree. SSAISD has an agreement with Palo Alto Community College.

SOURCE: SSAISD, Title I Program, 2003–04.

EXHIBIT A–19
ANNUAL DROPOUT RATES
SSAISD, PEER DISTRICTS, REGION 20, AND THE STATE
1997–98 THROUGH 2001–02

DISTRICT	1997–98	1998–99	1999–2000	2000–01	2001–02
Edgewood ISD	3.0%	3.5%	2.6%	1.4%	1.8%
Roma ISD	2.8%	2.6%	1.7%	0.7%	3.4%
Mercedes ISD	2.6%	1.0%	0.5%	0.5%	1.8%
South San Antonio ISD	**1.7%**	**2.2%**	**2.4%**	**1.6%**	**1.7%**
Harlandale ISD	0.9%	1.7%	0.6%	0.6%	0.6%
Region 20	**2.0%**	**1.9%**	**1.7%**	**1.1%**	**1.1%**
State	**1.6%**	**1.6%**	**1.3%**	**1.0%**	**0.9%**

SOURCE: Texas Education Agency, AEIS, 1998–99 through 2002–03.

EXHIBIT A–20
ANNUAL AND LONGITUDINAL DROPOUT RATES
SOUTH SAN ANTONIO HIGH SCHOOL
1997–98 THROUGH 2001–02

MEASURE	1997–98	1998–99	1999–2000	2000–01	2001–02
SOUTH SAN ANTONIO HIGH SCHOOL					
Annual Dropout Rate	2.3%	3.2%	3.6%	2.1%	2.9%
Longitudinal Dropout Rate	15.8%	16.9%	17.4%	11.2%	10.7%
CAMPUS GROUP					
Annual Dropout Rate	2.1%	1.5%	1.3%	0.9%	1.4%
Longitudinal Dropout Rate	9.5%	8.4%	8.5%	6.5%	5.4%

SOURCE: Texas Education Agency, AEIS, 1998–1999 through 2002–03.

EXHIBIT A–21
ANNUAL AND LONGITUDINAL DROPOUT RATES
SOUTH SAN ANTONIO HIGH SCHOOL WEST
1997–98 THROUGH 2001–02

MEASURE	1997–98	1998–99	1999–2000	2000–01	2001–02
SOUTH SAN ANTONIO HIGH SCHOOL WEST					
Annual Dropout Rate	0.9%	1.1%	1.5%	1.8%	1.2%
Longitudinal Dropout Rate	6.9%	7.5%	8.3%	7.5%	1.4%
CAMPUS GROUP					
Annual Dropout Rate	1.8%	1.7%	1.9%	1.4%	1.4%
Longitudinal Dropout Rate	9.4%	8.8%	7.7%	7.2%	6.5%

SOURCE: Texas Education Agency, AEIS, 1998–99 through 2002–03.

EXHIBIT A–22
REASONS FOR SSAISD STUDENTS LEAVING OR DROPPING OUT OF SCHOOL
2003–04

LEAVER CODES	2003–04 NUMBER	2003–04 PERCENT
DROPOUTS		
(14) Age	28	35.0%
(84) Academic performance	18	22.5%
(02) Pursued job/job training	7	8.8%
(08) Pregnancy	6	7.5%
(15) Homeless or non–permanent resident	*	*
(09) Marriage	*	*
(99) Other (unknown or not listed)	12	15.0%
Total Dropouts	*	100.0%
OTHER LEAVERS		
(80) Withdrew from/left school to enroll in another Texas public school district	571	44.6%
(01) Graduated	554	43.3%
(82) Withdrew from/Left school to enroll in school outside of Texas	43	3.4%
(16) Returned to home country	21	1.6%
(22) Enrolled in alternative program, in compliance, working toward a GED	21	1.6%
(61) Incarcerated outside the district	20	1.6%
(31) Completed alternative program	14	1.1%
(60) Withdrew for home schooling	13	1.0%
(72) Court ordered to alternative program	8	0.6%
Other reasons with five or fewer students	8	0.6%
(19) Failed exit TAKS/Failed to meet graduation requirements	7	0.5%
Total Other Leavers	1,280	99.9%

SOURCE: SSAISD, School Leaver Summary Fall Collection, 2003–04.
NOTE: Not identified per FERPA regulations.*

EXHIBIT A–23
PERCENT OF SSAISD STUDENTS LEAVING OR DROPPING OUT BY SCHOOL
2003–04

SCHOOL	DROPOUTS	OTHER LEAVERS	TOTAL
Dwight Middle School	3.7%	9.6%	9.3%
Kazen Middle School	0.0%	6.6%	6.2%
Shepard Middle School	0.0%	6.2%	5.8%
South San High School	57.5%	48.7%	49.3%
South San West Campus	26.2%	20.3%	20.7%
Competency Based High School	6.2%	6.9%	6.8%
South San Alternative school	6.2%	1.4%	1.7%
Juvenile Justice Alternative Education Program	0.0%	0.3%	0.3%
Total	**99.8%**	**100.0%**	**100.1%**

SOURCE: SSAISD, School Leaver Summary Fall Collection, 2003–04.
NOTE: Percentages may not equal 100 percent due to rounding.

EXHIBIT A–24
SSAISD PRINCIPALS, TEACHERS, ADMINISTRATIVE STAFF, AND PARENTS
PERCEPTIONS OF DISTRICT'S DROPOUT PREVENTION PROGRAMS
2003–04

QUESTION	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
The district has effective special programs for dropout prevention.					
Principals (N=26)	15.4%	34.6%	34.6%	15.4%	0.0%
Teachers (N=340)	6.5%	33.5%	43.2%	11.5%	4.7%
Administrative/Support Staff (N=282)	8.2%	36.2%	36.2%	11.0%	5.7%
Parents (N=39)	2.6%	35.9%	38.5%	10.3%	5.1%

SOURCE: *Legislative Budget Board, South San Antonio ISD Surveys, May 2004.*

EXHIBIT A–25
COMPETENCY BASED HIGH SCHOOL ENROLLMENT AND GRADUATION
2000–01 THROUGH 2002–03

	2000–01		2001–02		2002–03	
	NUMBER	PERCENT	NUMBER	PERCENT	NUMBER	PERCENT
Number of students enrolled	115	100.0%	101	100.0%	112	100.0%
Number of students enrolled 85 days or longer	65	56.5%	40	39.6%	40	35.7%
Number graduated who were enrolled 85 days or longer	31	26.9%	30	29.7%	27	24.1%
Number graduated who were enrolled less than 85 days	0	0.0%	11	10.9%	46	41.1%
Number withdrew	11	9.6%	10	9.9%	*	*
Number returned for next year	22	19.1%	7	6.9%	*	*
Number who need to pass TAAS/TAKS	*	*	0	0.0%	*	*

SOURCE: *SSAISD, Competency Based High School principal, May 2004.*
NOTE*: *Not identified per FERPA regulations.*

EXHIBIT A–26
COMPLETION CENTER STUDENT ENROLLMENT
2002–03 AND 2003–04

	JANUARY–MAY 2003	2003–04
Number of students**	25	60
Graduated with high school diploma	8	21
Received GED	*	0
Returned to main campus	*	*
Returned to South San Alternative School	*	20
Dropped out	*	*
Return to Center following year	8	6

SOURCE: *SSAISD, Completion Center Administrator, May 2004.*
NOTE*: *Not identified per FERPA regulations.*
** *Includes students from South San Alternative School and the two district high schools.*

EXHIBIT A–27
RECOMMENDED PERCENTAGE DISTRIBUTION OF COUNSELOR SERVICES BY LEVEL

SERVICE TYPE	ELEMENTARY	MIDDLE SCHOOL	HIGH SCHOOL
Guidance Curriculum	35–45%	35–40%	15–25%
Responsive Services	30–40%	30–40%	25–35%
Individual Planning	5–10%	15–25%	25–35%
System Support	10–15%	10–15%	15–20%

SOURCE: *Texas Education Agency, A Model Developmental Guidance and Counseling Program for Texas Public Schools (3rd edition), 1998.*

EXHIBIT A–28
SSAISD STUDENT/COUNSELING RATIOS
2003–04

SCHOOLS	ENROLLMENT	NUMBER OF COUNSELORS
Armstrong Elementary	488	0.8*
Athens Elementary	505	0.8*
Benavidez Elementary	680	1.0
Carrillo Elementary	511	1.0
Five Palms Elementary	408	0.4**
Hutchins Elementary	551	1.0
Kindred Elementary	475	0.4**
Palo Alto Elementary	633	1.0
Price Elementary	489	0.8*
Royalgate Elementary	507	0.8*
ELEMENTARY STUDENT/COUNSELOR RATIO: 1:656		
Dwight Middle School	808	2.0
Kazen Middle School	817	2.0
Shepard Middle School	570	1.0
MIDDLE SCHOOL STUDENT/COUNSELOR RATIO: 1:439		
South San Antonio High School	1,765	4.0
South San Antonio High School – West	631	2.0
HIGH SCHOOL STUDENT/COUNSELOR RATIO: 1:399		
Alternative School	90	***
Specialists	n/a	6.0
Total	9,928	25.0
District Student/Counselor Ratio: 1:397		

SOURCE: Texas Education Agency, PEIMS 2003–04; SSAISD Guidance and Counseling Office.
*counseling services four days a week, **counseling services two days a week, ***provided part–time by specialist counselors through Safe and Drug Free funding.

EXHIBIT A–29
STUDENT/HEALTH SERVICES RATIO

CAMPUS	ENROLLMENT	REGISTERED NURSE	LVN	HEALTH AIDE	NURSE/ STUDENT RATIO
Armstrong Elem.	488	1.0	0	0	1:488
Athens Elem.	505	1.0	0	0	1:505
Benavidez Elem.	680	1.0	0	1.0	1:680
Carrillo Elem.	511	1.0	0	0	1:511
Five Palms Elem.	408	1.0	0	0	1:408
Hutchins Elem.	551	1.0	0	0	1:551
Kindred Elem.	475	1.0	0	0	1:475
Palo Alto Elem.	633	1.0	0	0.5	1:633
Price Elem.	489	1.0	0	0.5	1:489
Royalgate Elem.	507	1.0	0	0.5	1:507
Dwight Middle	808	1.0	0.5	0	1:539
Kazen Middle	817	1.0	0	0.5	1:817
Shepard Middle	570	1.0	0	0	1:570
SSAHS	1,765	1.0	0.5	1.0	1:1,177
SSAHS – West	631	0.5	0	1.0	1:631
Health Services – District	0	0.5	0	0	1:0
Total	**9,838**	**15.0**	**1.0**	**5.0**	**1:655**

SOURCE: Texas Education Agency, PEIMS, 2003–04;and SSAISD Health Services Office, May 2004

EXHIBIT A–30
SSAISD MIGRANT STUDENT ENROLLMENT
1999–2000 THROUGH 2003–04

YEAR	ENROLLMENT	MIGRANT STUDENTS	PERCENT OF MIGRANT STUDENTS
1999–2000	10,007	348	3.5%
2000–01	9,984	366	3.7%
2001–02	9,970	422	4.2%
2002–03	10,018	291	2.9%
2003–04	9,928	283	2.9%

SOURCE: SSAISD, South San Antonio Migrant Program Identification and Recruitment Plan and New Generation System (NGS), 2003–04, and Texas Education Agency, AEIS, 1999–2000 through 2002–03.

EXHIBIT A–31
PERCENTAGE OF SSAISD MIGRANT AND NON–MIGRANT STUDENTS PASSING TAKS
2002–03

GRADE/SUBJECT	MIGRANT STUDENTS	ALL STUDENTS
GRADE 3		
Reading	83%	89%
Math	88%	93%
GRADE 4		
Reading	85%	83%
Math	85%	86%
Writing	88%	82%
All Tests	75%	71%
GRADE 5		
Reading	73%	76%
Math	91%	88%
Science	82%	73%
All Tests	55%	61%
GRADE 6		
Reading	43%	77%
Math	100%	68%
All Tests	43%	59%
GRADE 7		
Reading	71%	80%
Math	44%	59%
Writing	81%	87%
All Tests	55%	54%
GRADE 8		
Reading	75%	81%
Math	73%	54%
Social Studies	73%	91%
All Tests	50%	53%
GRADE 9		
Reading	50%	74%
Math	25%	37%
All Tests	26%	36%
GRADE 10		
English Language Arts	60%	50%
Math	56%	47%
Social Studies	82%	78%
Science	73%	47%
All Tests	33%	25%
GRADE 11		
English Language Arts	40%	57%
Math	38%	47%
Social Studies	78%	85%
Science	14%	47%
All Tests	0%	29%

SOURCE: SSAISD, TAKS Summary Report – Group Performance, April 2003.

EXHIBIT A–32
GIFTED AND TALENTED PROGRAM REQUIREMENTS
CURRICULUM AND INSTRUCTION
ACCEPTABLE, RECOGNIZED, AND EXEMPLARY

COMPONENT REQUIRED FOR ACCEPTABLE STATUS	COMPONENT REQUIRED FOR RECOGNIZED STATUS	COMPONENT REQUIRED FOR EXEMPLARY STATUS
An array of appropriately challenging learning experiences is offered emphasizing content from the four core academic areas.	Opportunities are provided for students to pursue areas of interest in selected disciplines through guided and independent research. Opportunities are provided for career and leadership assessment and training in areas of student strength.	Options are provided in intellectual, creative, or artistic area; leadership; and specific academic fields.
A continuum of learning experiences is provided leading to the development of advanced-level products or performances.	Students at all levels are involved in experiences resulting in development of advanced-level products or performances targeted to audiences outside the classroom.	Students in G/T programs for more than one year will develop advanced-level products evaluated by external evaluators knowledgeable about the area of the product.
Opportunities are provided for students to accelerate in areas of student strengths.	Flexible pacing is used allowing students to learn at the pace and level appropriate to their abilities and skills.	Scheduling modifications are used to meet the needs of individual students.
District and campus improvement plans include provisions related to the needs of gifted and talented students	Curriculum is modified based on annual evaluations. Resources and release time for staff are provided for curriculum development. Guidelines are developed and used for evaluating resources and in selecting appropriate materials.	Collaboration occurs among appropriate staff in designing and evaluating curriculum for gifted and talented students.
	Release time or contract extensions are provided to enable teachers at all levels to collaboratively develop services for gifted and talented students.	
	Student progress or performance is periodically assessed and communicated to parents.	Student performance is assessed by standards developed by experts in the areas served in the district's program.

SOURCE: Texas Education Agency, Texas State Plan for the Education of Gifted/Talented Students, May 2000.

EXHIBIT A–33
PERCENT OF STUDENTS, TEACHERS, AND BUDGETED INSTRUCTIONAL
OPERATING EXPENDITURES IN GIFTED/TALENTED (G/T) PROGRAMS
SSAISD, PEER DISTRICTS, REGION 20, AND THE STATE

DISTRICT	G/T STUDENT ENROLLMENT	G/T TEACHERS	G/T PROGRAM OPERATING EXPENDITURES
Mercedes ISD	7.5	0.9	1.5
Roma ISD	7.4	0.0	0.5
Edgewood ISD	7.3	2.8	0.2
South San Antonio ISD	7.2	8.7	2.7
Harlandale ISD	5.8	0.6	0.8
Region 20	7.0	2.9	1.5
State	7.8	2.3	1.8

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

EXHIBIT A–34
TEXAS EDUCATION CODE PURCHASING REQUIREMENTS

	PURCHASES OF $25,000 OR MORE	**PURCHASES BETWEEN $10,000 AND $25,000**
Procurement methods	Competitive bidding Competitive sealed proposals Request for proposals Catalog purchases Interlocal contracts Design/build contracts Job order contracts Construction management contracts Reverse auctions Formation of a political subdivision corporation	Use methods for purchases at or more than $25,000 Or Obtain quotes from the vendor list established by the district
Exceptions	Produce and vehicle fuel Sole source Professional services (architect, attorney or fiscal agent) Emergency repairs	Produce and vehicle fuel must be purchased using the purchasing methods above

SOURCE: *Texas Education Code (TEC), Sections 44.031 through 44.033.*

EXHIBIT A–35
PURCHASING STAFFING
SSAISD AND PEER DISTRICT COMPARISONS
2003–04

DISTRICT	**POSITIONS**
South San Antonio ISD	Director of Purchasing (1) Purchasing Secretary (1)
Mercedes ISD	Purchasing Supervisor (1) Purchasing Clerk (2)
Roma ISD	Accounting/Purchasing Staff (2)
Harlandale ISD	Purchasing Manager (1) Purchasing Secretary (1) Purchasing Receptionist/Clerk (1)
Edgewood ISD	Purchasing Agent (1) Buyer (1) Secretary (1) Contract Specialist (1) Purchasing Clerk (2)

SOURCE: *SSAISD, Purchasing Department and Peer district surveys, May 2004.*

EXHIBIT A–36
SSAISD WAREHOUSE ORGANIZATION
2003–04

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                    ┌─────────────────────────┐
                    │     Superintendent      │
                    └─────────────────────────┘
                                 │
                    ┌─────────────────────────┐
                    │       Administrator      │
                    │           for            │
                    │  School Support Services │
                    └─────────────────────────┘
                                 │
                    ┌─────────────────────────────────────┐
                    │              Director                │
                    │                 of                   │
                    │  Special Projects/Transportation/    │
                    │   Bond Projects /Warehouse           │
                    └─────────────────────────────────────┘
                                 │
                          ┌──────────────┐
                          │  Warehouse   │
                          │  Supervisor  │
                          └──────────────┘
                                 │
                                 ├── Warehouse Secretary
                                 └── Warehousemen (3)
```
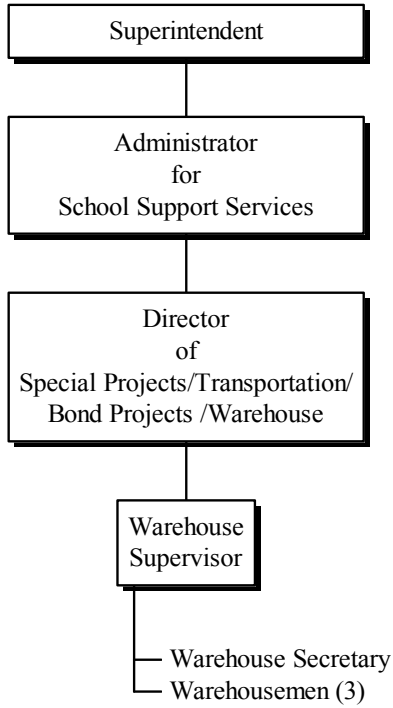
SOURCE: SSAISD, Organization Chart, March 11, 2004.

EXHIBIT A–37
SSAISD CURRENT COMMUNICATIONS
2003–04

COMMUNICATION	DESCRIPTION	METHOD OF DISTRIBUTION	FREQUENCY
SSAISD website www.southsanisd.net	Internal/External Communication	Internet	Ongoing
Scratch Pad	Internal Communication – Newsletter	Distributed at schools and district office	Monthly
Today's South San	External Communication – Newsletter (English)	In 2003–04, approximately 23,500 households in three zip codes	Twice a Year
SCHOOL NEWSLETTERS			
Athens Elementary Newsletter	Internal/External Communication – School Level Newsletters (English)	Distributed at schools and district office	Monthly
Paw Prints (South San Antonio High School)		Mail	
Patriot Patter (Shepard Middle School)		Distributed at schools and district office	
School Calendars	Informational monthly school–level events	Distributed at schools – sent home with students	Monthly Yearly
MISCELLANEOUS PUBLICATIONS			
Brochures, handbooks education program booklets	Program and service information	Distributed at schools and district office	Ongoing
Information booklets, flyers, and brochures	Internal/External Communication – District Level	Distributed at schools and district office	Ongoing
No Child Left Behind	Internal/External Communication – District Level	Distributed at schools and district office	Ongoing
South San Antonio ISD: A Blueprint for Excellence 2003–2004	Internal/External Communication – District Level	Distributed at schools and district office	Ongoing
District and Campus Site–Based Decision–Making Administrative Procedures	Internal/External Communication – District and School Level	Distributed at schools and district office	Ongoing

SOURCES: *SSAISD, Parent Development Center and Communications and Community Relations Department, May 2004.*

EXHIBIT A–38
SSAISD MAINTENANCE AND OPERATIONS DEPARTMENT
2003–04

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                        ┌─────────────────────┐
                        │    Superintendent   │
                        └──────────┬──────────┘
                                   │
                        ┌──────────┴──────────┐
                        │    Administrator    │
                        │         for         │
                        │   School Support    │
                        │      Services       │
                        └──────────┬──────────┘
                   ┌───────────────┴───────────────┐
        ┌──────────┴──────────┐         ┌──────────┴──────────┐
        │      Director       │         │    Construction     │
        │ of Special Projects/│         │      Manager        │
        │ Transportation/Bond │         │    (Contractor)     │
        │  Projects/Warehouse │         │                     │
        └──────────┬──────────┘         └─────────────────────┘
      ┌────────────┼────────────────────┐
┌─────┴─────┐ ┌────┴─────┐      ┌────────┴───────┐
│Maintenance│ │Supervisor│      │   Supervisor   │
│Supervisor │ │ Day Time │      │   Night Time   │
│ (Vacant)  │ │Custodians│      │   Custodians   │
└─────┬─────┘ └────┬─────┘      └────────┬───────┘
      │            │                     │
      │     └─ Custodians (29.5)   └─ Custodians (45)
      ├─ HVAC (5)
      ├─ Electricians (4)
      ├─ Plumbers (2)
      ├─ General Maintenance (8)
      ├─ Grounds Crew (5)
      ├─ Integrated Pest Mgmt.
      │  (IPM) Coordinator (1)
      └─ Parts Runner (1)
```

SOURCE: SSAISD, Organization Chart March 11, 2004.

EXHIBIT A–39
SSAISD FACILITY INFORMATION
2003–04

FACILITY	YEAR BUILT	SQUARE FOOTAGE*	ACREAGE	NUMBER OF PORTABLES
South San Antonio High School	1956	274,319	27	0
South San High School West Campus	1976	140,335	24	3
Career Education	1977	43,000	4	0
Dwight Middle School	1995	145,031	10	1
Shepard Middle School	1971	99,573	7	0
Kazen Middle School	1979	106,492	11	5
Athens Elementary School	1948	68,900	10	0
Hutchins Elementary School	1953	70,615	10	1
Kindred Elementary School	1965	56,830	10	2
Palo Alto Elementary School	1959	78,439	11	1
Price Elementary School	1952	40,000	9	0
Royalgate Elementary School	1961	60,350	10	2
Five Palms Elementary School	1968	56,760	10	4
Armstrong Elementary School	1970	60,901	10	3
Olivares Elementary School	1973	51,750	9	0
Carrillo Elementary School	1992	52,403	9	0
Benavidez Elementary School	2000	99,641	21.4	0
Administration Building	1973	18,080	2	7
Transportation/Maintenance Building	1973	7,320	7	3
Warehouse Facility	1959	21,440	2	1
Special Education Building (Southcross)	1998	8,000	2	0
Special Programs Building (Southcross)	1961	2,500	1	0
Records Management Building	2004	7,906	1	0
Parent Development Center	1988	5,580	2	0
Food Service Department (portable)	N/A	1,440	0	1
Athletics	N/A	2,880	0	2
Tax Office Portable	N/A	1,440	0	1
Totals		**1,581,925**	**219.4**	**37**

SOURCE: SSAISD Administrator for School Support Services, May 2004.
*NOTE: Figures includes square footage for all portables.
N/A denotes not applicable.

EXHIBIT A–40
SSAISD CONSTRUCTION PROJECTS
1999 BOND PROGRAM

PROJECT AND PHASE (#)	BUDGET AMOUNT	CHANGE ORDER AMOUNT	FINAL CONTRACT AMOUNT
New Elementary School (1)	$8,729,829	$192,090	$8,921,919
South San Antonio High School (1)	6,738,361	727,075	7,465,436
Shepard Middle School (1)	4,844,292	352,074	5,196,366
Athens Elementary (2)	1,715,207	584	1,715,791
Five Palms Elementary (2)	1,890,128	92,443	1,982,571
Armstrong Elementary (2)	1,845,426	11,615	1,857,041
Kazen Middle School (2)	2,575,239	40,020	2,615,259
Dwight Middle School (3)	127,780	(28,377)	99,403
Price Elementary	462,024	(54,283)	407,741
Hutchins Elementary (3)	563,907	(77,451)	486,456
Kindred Elementary (3)	908,046	159,390	1,067,436
Palo Alto Elementary (3)	577,294	(32,383)	544,911
Royalgate Elementary (3)	734,318	(46,375)	687,943
South San Antonio H.S. West Campus (3)	354,584	9,800	364,384
Allowances	2,800,000	0	2,800,000
Totals	**$34,866,435**	**$1,346,222**	**$36,212,657**

SOURCE: South San Antonio ISD Bond Issue and Financial Records.
NOTE: Additional funds were used from the General Fund balance to make up the shortfall in bond funds.
Contingency funds in the amount of $3,600,000 were assigned to the contracts.

EXHIBIT A–41
SSAISD CONSTRUCTION PROJECTS
2002 BOND PROGRAM

PHASE AND PROJECT	BUDGET AMOUNT	PHASE AMOUNT	GUARANTEED MAXIMUM PRICE*
Phase 1 Projects:		$10,673,944	*
New Middle School	$9,381,690		
New Community Learning Center	1,292,254		
Phase 2 Projects:		5,588,591	$5,583,591
Carrillo Elementary	275,000		
Hutchins Elementary	1,683,169		
Palo Alto Elementary	1,947,253		
Royalgate Elementary	1,683,169		
Phase 2B Projects:		8,332,465	8,327,465
Shepard Middle School	500,000		
West Campus High School	3,297,254		
South San High School	4,535,211		
Phase 3 Projects:		7,005,000	6,263,246
Armstrong Elementary	1,155,000		
Dwight Middle School	75,000		
Olivares Elementary	1,155,000		
Athens Elementary	1,155,000		
Kindred Elementary	1,155,000		
Five Palms Elementary	1,155,000		
Price Elementary	1,155,000		
Contingency	1,500,000	1,500,000	$1,500,000
Allowances	2,400,000	2,400,000	$2,400,000
Total	**$35,500,000**	**$35,500,000**	**N/A***

SOURCE: *Texas Education Agency Instructional Facilities Allotment form submitted by SSAISD, dated 6/12/2002.*
*NOTE: *The Guaranteed Maximum price for phase 1 has not been established.*
 N/A denotes not applicable.

EXHIBIT A–42
TECHNOLOGY EXPENDITURES
SOUTH SAN ANTONIO ISD, PEER DISTRICTS, REGION 20, AND THE STATE
2002–03

DISTRICT	TOTAL EXPENDITURES	TOTAL STUDENTS	PER STUDENT EXPENDITURE
Mercedes ISD	$633,900	5,250	$121
Harlandale ISD	$1,445,238	14,365	$101
South San Antonio ISD	**$757,459**	**10,018**	**$76**
Roma ISD	$460,600	6,167	$75
Edgewood ISD	$820,992	13,153	$62
Region 20	**$22,231,503**	**343,821**	**$65**
State	**$348,481,432**	**4,239,911**	**$82**

SOURCE: *Texas Education Agency, Academic Excellence Indicator System (AEIS), 2002–03.*

EXHIBIT A–43
TECHNOLOGY EXPENDITURE COMPARISON
SSAISD, REGION 20, AND THE STATE
1998–99 THROUGH 2002–03

	1998–99	1999–2000	2000–01	2001–02	2002–03
South San Antonio ISD	$572,954	$707,079	$629,055	$687,641	$757,459
Percent of Total	0.9%	1.0%	1.0%	1.1%	1.1%
Region 20	$15,813,445	$15,839,227	$18,189,282	$20,130,396	$22,231,503
Percent of Total	0.9%	0.8%	0.9%	1.0%	1.0%
State	$214,598,187	$243,622,559	$298,526,325	$314,553,132	$348,481,432
Percent of Total	1.0%	1.1%	1.2%	1.2%	1.3%

SOURCE: *Texas Education Agency, AEIS, 1998–99 through 2002–03.*

EXHIBIT A–44
SSAISD E–RATE AWARDS
1999–2000 THROUGH 2003–04

USE	1999–2000	2000–01	2001–02	2002–03	2003–04
Internal Connections	$938,706	$1,900,701	$2,591,145	$905,914	$358,233
Internet Access	$3,204	$25,895	$3,240	$6,761	$28,033
Telecommunication Services	$253,235	$279,806	$313,207	$317,290	$264,005
Total Award Amount	$1,195,145	$2,206,402	$2,907,592	$1,229,965	$650,271

SOURCE: The Universal Service Administrative Company, 1999–2000 through 2003–04.

EXHIBIT A–45
SSAISD TEXAS STAR CHART RESULTS
SPRING 2003–04

KEY AREA I: TEACHING AND LEARNING – ADVANCED (15–20)						
TEACHER ROLE AND COLLABORATIVE LEARNING	PATTERNS OF TEACHER USE	FREQUENCY /DESIGN OF INSTRUCTION	CURRICULUM AREAS	TECHNOLOGY APPLICATION TEKS ASSESSMENT	PATTERNS OF STUDENT USE	SCORE
2.5	2.6	2.4	2.7	2.5	2.6	15.3
KEY AREA II: EDUCATOR PREPARATION AND DEVELOPMENT – ADVANCED (15–20)						
CONTENT OF TRAINING	CAPABILITIES OF EDUCATORS	LEADERSHIP CAPABILITIES OF ADMINISTRATORS	MODELS OF PROFESSIONAL DEVELOPMENT	UNDER–STANDING AND PATTERNS OF USE	TECHNOLOGY BUDGET	SCORE
2.6	2.5	2.8	2.7	2.6	2.4	15.4
KEY AREA III: ADMINISTRATION AND SUPPORT – ADVANCED (13–17)						
VISION AND PLANNING	TECHNICAL SUPPORT	INSTRUCTION AND ADMINISTRATIVE STAFFING	BUDGET	FUNDING		SCORE
2.8	2.8	2.4	2.4	2.7		13.2
KEY AREA IV: INFRASTRUCTURE FOR TECHNOLOGY – ADVANCED (13–17)						
STUDENTS PER COMPUTER	INTERNET ACCESS CONNECTIVITY /SPEED	DISTANCE LEARNING	LAN/WAN	OTHER TECHNOLO–GIES		SCORE
2.6	3.6	1.5	3.2	2.5		13.3

SOURCE: SSAISD, Technology Department, and Texas Education Agency, Texas School Technology and Readiness (StaR) Chart, March 2003–04.

EXHIBIT A-46
SOUTH SAN ANTONIO ISD WIDE AREA NETWORK
2003-04
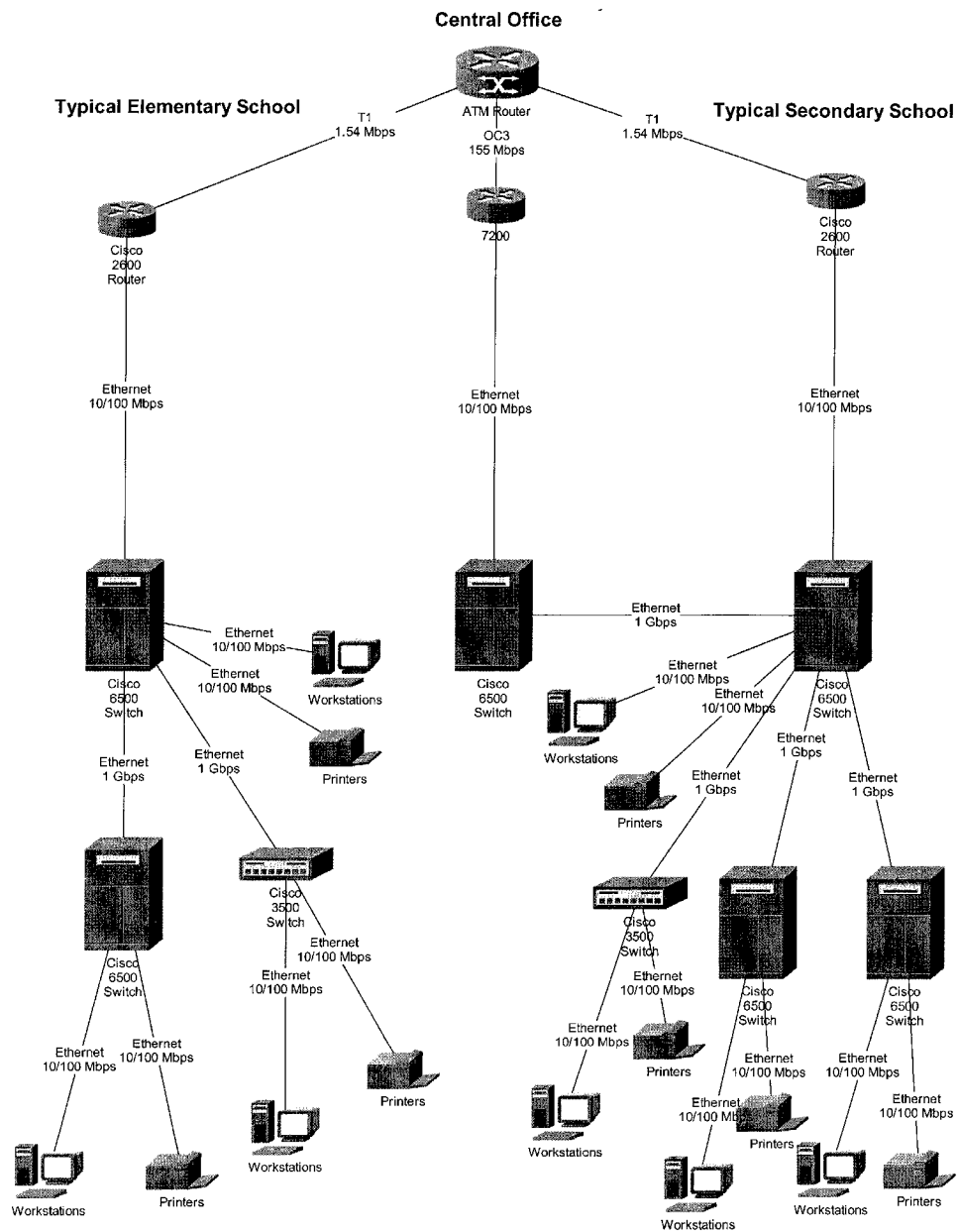
EXHIBIT A–47
SSAISD HUMAN RESOURCES AND STUDENT SERVICES ORGANIZATION
2003–04

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                        ┌────────────────────┐
                        │ Executive Director  │
                        │  for Human Resources│
                        │ and Student Services│
                        └────────────────────┘
          ┌──────────────────────┼──────────────────────┐
  ┌───────────────┐      ┌─────────────────┐     ┌─────────────────┐
  │  Director of  │      │   Director of   │     │     Health      │
  │   Personnel   │      │   Guidance and  │     │    Services     │
  │   Services    │      │    Counseling   │     │   Coordinator   │
  └───────────────┘      └─────────────────┘     └─────────────────┘
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— Certification Officer   — Secondary Counselors   — Nurses
— PEIMS Specialist   — Elementary Counselors
— Director's Secretary   — Special Counselors
— Personnel Secretary   — Nurses Aides
— Personnel Clerk
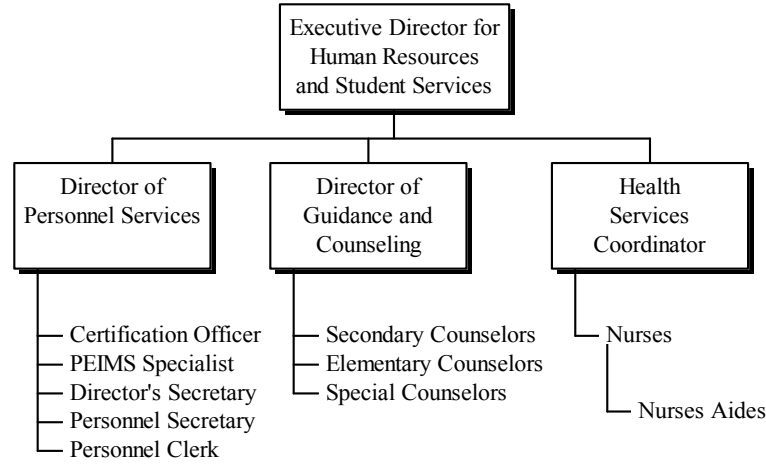
SOURCE: SSAISD, Human Resources Department organization chart, 2004.

EXHIBIT A–48
STAFF COMPARISON
SSAISD, PEER DISTRICTS
2003–04

	HARLANDALE ISD	EDGEWOOD ISD	SOUTH SAN ANTONIO ISD	ROMA ISD	MERCEDES ISD	STATE
Ratio of Support Staff to Teachers	1:5	1:3	**1:7**	1:9	1:6	**1:6**
Ratio of Educational Aides to Teachers	1:5	1:5	**1:4**	1:3	1:3	**1:5**
Ratio of Central Administrators to Teachers	1:43	1:15	**1:47**	1:29	1:35	**1:50**
Ratio of Campus Administrators to Teachers	1:17	1:15	**1:18**	1:17	1:17	**1:21**

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

EXHIBIT A–49
SSAISD AVERAGE SALARY COMPARISONS
TEACHERS, ADMINISTRATORS, AND PROFESSIONAL SUPPORT STAFF
2000–01 THROUGH 2003–04

POSITION	AVERAGE SALARY 2000–01	AVERAGE SALARY 2001–02	AVERAGE SALARY 2002–03	AVERAGE SALARY 2003–04	PERCENT CHANGE +/(–) 2000–04
Teacher with 1–5 years of experience	$34,257	$34,293	$35,124	$35,206	2.8%
Teacher with 6–10 years of experience	$37,734	$37,812	$38,704	$38,804	2.8%
Teacher with 11–20 years of experience	$45,601	$45,195	$46,253	$46,112	1.1%
Teacher with 20+ years experience	$51,548	$51,440	$52,897	$53,937	4.6%
Campus Administrator	$57,559	$57,194	$58,048	$60,833	5.7%
Central Administrator	$70,784	$68,711	$70,255	$74,615	5.4%
Professional Support	$49,908	$49,261	$50,790	$52,121	4.4%

SOURCE: Texas Education Agency, AEIS, 2000–03 and PEIMS, 2003–04.

EXHIBIT A–50
AVERAGE SALARIES
SSAISD, AVAILABLE PEER DISTRICTS, REGION 20, AND STATE
2003–04

DISTRICT	TEACHERS	PROFESSIONAL SUPPORT STAFF	CAMPUS ADMINISTRATION	CENTRAL ADMINISTRATION
Harlandale ISD	$40,647	$51,121	$64,240	$77,725
Edgewood ISD	$40,992	$46,854	$57,427	$81,172
South San Antonio ISD	$43,365	$52,121	$60,833	$74,615
Region 20	$41,583	$49,312	$63,906	$90,514
State	$40,476	$48,071	$63,149	$92,021

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

EXHIBIT A–51
TEACHER TURNOVER RATE
SSAISD, PEER DISTRICT, REGION 20, AND STATE
1999–2000 THROUGH 2002–03

DISTRICT	1999–2000	2000–01	2001–02	2002–03
Harlandale ISD	12.4%	12.1%	9.1%	16.3%
Edgewood ISD	16.5%	22.6%	19.0%	19.6%
South San Antonio ISD	8.4%	11.0%	11.4%	12.4%
Roma ISD	15.2%	15.4%	16.0%	13.9%
Mercedes ISD	11.0%	13.2%	16.9%	14.4%
Region 20	13.3%	14.2%	14.2%	14.2%
State	15.0%	16.0%	15.7%	15.6%

SOURCE: *Texas Education Agency, AEIS 1999–2000 through 2002–03.*

EXHIBIT A–52
BUSINESS SERVICES
MAY 2004

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                         ┌─────────────────┐
                         │  Superintendent │
                         └────────┬────────┘
                                  │
                         ┌────────┴────────┐
                         │ Executive Director │
                         │       for         │
                         │ Business and Finance │
                         │     Services       │
                         └────────┬────────┘
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              ┌───────────────┐   │
              │   Secretary   │   │
              └───────────────┘   │
                                  │
      ┌──────────┬──────────┬─────┴─────────┬──────────────┐
┌──────────┐ ┌──────────┐ ┌──────────┐          ┌──────────┐
│ Payroll  │ │ General  │ │Director of│          │Director of│
│Supervisor│ │Accountant│ │ Budget and│          │Purchasing │
│          │ │          │ │Fiscal Svc│          │           │
└────┬─────┘ └──────────┘ └────┬─────┘          └────┬─────┘
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— Payroll Bookkeepers (3)
— Payroll Clerk (1)

— Chief Bookkeeper (1)
— Accounts Payable Clerks (3)
— Bookkeepers (2)

— Purchasing Secretary (1)
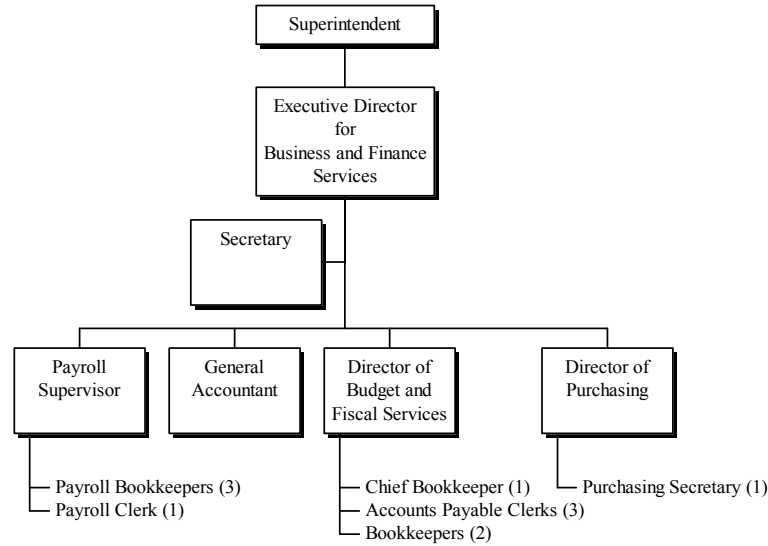
SOURCE: SSAISD, executive director for Business and Finance Services, May 2004.

EXHIBIT A–53
TAX RATE COMPARISON
SSAISD, PEER DISTRICTS, REGION 20, AND STATE

DISTRICT	MAINTENANCE AND OPERATIONS	INTEREST AND SINKING	TOTAL TAX RATE
Edgewood ISD	$1.460	$0.114	$1.574
Roma ISD	$1.500	$0.096	$1.596
Mercedes ISD	$1.500	$0.120	$1.620
South San Antonio ISD	**$1.500**	**$0.230**	**$1.730**
Harlandale ISD	$1.500	$0.256	$1.756
Region 20	**$1.427**	**$0.122**	**$1.549**
State *	**$1.430**	**$0.103**	**$1.533**

SOURCE: Texas Education Agency, AEIS Reports 2002–03.
* The $0.103 I&S tax rate includes the 312 districts with no I&S tax rate.

EXHIBIT A–54
SSAISD TAX RATE HISTORY
1999–2000 THROUGH 2003–04

TAX RATE COMPONENT	1999–2000	2000–01	2001–02	2002–03	2003–04	PERCENT CHANGE FROM 1999–2000
Maintenance and Operations	$1.460	$1.427	$1.480	$1.500	$1.500	2.7%
Debt Service	$0.163	$0.192	$0.150	$0.230	$0.218	33.7%
Total Tax Rate	**$1.623**	**$1.619**	**$1.630**	**$1.730**	**$1.718**	**5.9%**

SOURCE: SSAISD, executive director of Business and Finance Services, April 2004.

EXHIBIT A–55
SSAISD TAX INFORMATION
1999–2000 THROUGH 2003–04

	1999–2000 ACTUAL	2000–01 ACTUAL	2001–02 ACTUAL	2002–03 ACTUAL	PERCENT CHANGE 1999–2000 THROUGH 2002–03	2003–04 BUDGET
Tax Levy	$8,368,958	$9,010,306	$10,071,938	$11,914,930	42.4%	$13,146,474
Current Year Taxes	$6,402,642	$7,260,166	$8,212,987	$9,620,683	50.3%	$12,817,813
Delinquent Taxes	$1,646,174	$1,722,650	$1,982,905	$2,460,788	49.5%	$0
Penalties & Interest	$72,251	$19,874	$4,770	$52,474	(27.4%)	$0
Total Collections	$8,121,067	$9,002,690	$10,200,662	$12,133,945	49.4%	$12,817,813
Percent of Total Collections to Levy	97.0%	99.9%	101.3%	101.8%		97.5%

SOURCE: SSAISD, audited financial statements1999–2000 through 2002–03; Texas Education Agency, PEIMS reports 1999–2000 through 2002–03; SSAISD budget documents 2003–04.

EXHIBIT A–56
GENERAL, FOOD SERVICE, AND DEBT SERVICE FUND REVENUE
SSAISD
1999–2000 THROUGH 2003–04

	1999–2000 ACTUAL	2000–01 ACTUAL	2001–02 ACTUAL	2002–03 ACTUAL	PERCENT CHANGE 1999–2000 THROUGH 2002–03	2003–04 BUDGET
Local Tax Revenue	$8,121,067	$9,002,690	$10,200,662	$12,133,945	49.4%	$12,817,813
Other Local Revenue	$2,514,347	$2,373,697	$1,471,616	$1,364,082	(45.7%)	$1,408,426
State Revenue	$52,087,656	$51,309,192	$53,386,944	$55,620,900	6.8%	$55,768,017
Federal Revenue	$4,405,602	$4,590,551	$4,916,779	$5,354,506	21.5%	$5,270,959
Total Revenue	**$67,128,672**	**$67,276,130**	**$69,976,001**	**$74,473,433**	**10.9%**	**$75,265,215**

SOURCE: Texas Education Agency, PEIMS 1999–2000 through 2003–04.

EXHIBIT A–57
SSAISD STATE ASSISTANCE FOR BONDED DEBT
1999–2000 THROUGH 2003–04

	1999–2000	2000–01	2001–02	2002–03	2003–04
Principal	$5,080,875	$2,039,946	$2,009,443	$2,863,203	$2,541,054
Interest	$2,833,853	$3,165,677	$3,184,624	$4,792,353	$4,845,861
Total Payments	$7,914,728	$5,205,623	$5,194,067	$7,655,556	$7,386,915
State Portion	$4,320,617	$4,243,609	$4,289,695	$5,929,336	$5,739,364
Local Portion	$1,142,699	$962,014	$904,372	$1,726,220	$1,647,551
State Percentage	**54.6%**	**81.5%**	**82.6%**	**77.5%**	**77.7%**

SOURCE: Texas Education Agency, PEIMS 1999–2000 through 2002–03; SSAISD, audited financial statements, 1999–2000 through 2002–03; SSAISD 2003–04 budget.

EXHIBIT A–58
BONDED DEBT OUTSTANDING
AUGUST 31, 2003

DESCRIPTION	SERIES	INTEREST RATE	ORIGINAL AMOUNT	AMOUNT OUTSTANDING
School Building Bonds	1992	3.25% to 6.60%	$22,172,442	$6,506,250
Unlimited Refunding Bonds	1994	2.80% to 5.75%	$9,229,968	$7,224,968
School Building Bonds	1994	5.10% to 8.10%	$4,995,000	$825,000
Unlimited Refunding Bonds	1999	4.50% to 6.00%	$37,714,995	$35,149,995
School Building Bonds	2002	2.00% to 5.00%	$35,220,000	$34,250,000
Total			**$109,332,405**	**$83,956,213**

SOURCE: SSAISD, audited financial statement 2002–03.

EXHIBIT A–59
CAPITAL PROJECTS FUND
1999–2000 THROUGH MARCH 2004

	1999–2000	*2000–01*	*2001–02*	*2002–03*	*2003–04*
Fund Balance, Beginning	$0	$36,408,352	$35,962,679	$8,948,140	$37,106,375
Bond Proceeds	$35,000,711	$0	$0	$35,105,161	$0
Interest Earnings	$1,886,530	$2,039,787	$1,627,426	$782,965	$287,034
Expenditures	($478,889)	($2,417,709)	($28,641,965)	($7,729,891)	($956,852)
Prior Period Adjustment*		($67,751)			
Fund Balance, Ending	**$36,408,352**	**$35,962,679**	**$8,948,140**	**$37,106,375**	**$36,436,557**

SOURCE: SSAISD, audited financial statements 1999–2000 through 2002–03; monthly financial report, March 2004. * The prior period adjustment was to reflect a liability from the prior year.

EXHIBIT A–60
SSAISD EXPENDITURES BY OBJECT
1999–2000 THROUGH 2003–04

OBJECT DESCRIPTION	*1999–2000 ACTUAL*	*2000–01 ACTUAL*	*2001–02 ACTUAL*	*2002–03 ACTUAL*	*PERCENT CHANGE FROM 1999–2000*	*2003–04 BUDGET*
Payroll	$59,765,674	$57,475,321	$56,320,658	$60,409,219	1.1%	$59,644,601
Contracted Services	$4,483,096	$4,706,466	$5,509,239	$5,500,302	22.7%	$4,476,234
Supplies	$4,296,935	$4,818,499	$5,633,500	$6,584,962	53.2%	$4,193,463
Other Operating	$783,083	$903,871	$902,910	$1,211,578	54.7%	$1,206,071
Debt Service	$5,383,867	$5,394,469	$5,226,068	$7,490,765	39.1%	$7,714,165
Capital Outlay	$3,044,491	$4,093,069	$29,667,522	$8,194,627	169.2%	$326,372
Total	**$77,757,146**	**$77,391,695**	**$103,259,897**	**$89,391,453**	**15.0%**	**$77,560,906**

SOURCE: Texas Education Agency, PEIMS 2003–04.

EXHIBIT A–61
SSAISD AND PEER DISTRICTS
BUDGETED OPERATING EXPENDITURES BY FUNCTION
2003–04

FUNCTION	*EDGEWOOD ISD*	*HARLANDALE ISD*	*MERCEDES ISD*	*ROMA ISD*	*SOUTH SAN ANTONIO ISD*
Enrolled Students	12,873	14,072	5,329	6,222	**9,928**
Instruction (11, 95)	$3,506	$3,576	$3,738	$3,279	**$3,941**
Instructional Resources and Media Services (12)	$152	$115	$121	$78	**$146**
Curriculum and Staff Development (13)	$92	$118	$22	$5	**$43**
Instructional Leadership (21)	$88	$78	$184	$79	**$162**
School Leadership (23)	$383	$581	$336	$306	**$405**
Guidance and Counseling Services (31)	$248	$279	$125	$98	**$228**
Social Work Services (32)	$64	$75	$33	$33	**$31**
Health Services (33)	$90	$92	$26	$49	**$97**
Student Transportation (34)	$71	$135	$265	$173	**$103**
Food Services (35)	$465	$582	$579	$495	**$519**
Co–/Extracurricular Activities (36)	$133	$97	$145	$215	**$175**
General Administration (41, 92)	$370	$230	$308	$186	**$234**
Plant Maintenance/Operations (51)	$883	$920	$850	$665	**$647**
Security and monitoring services (52)	$98	$71	$50	$79	**$73**
Data Processing Services (53)	$207	$137	$123	$81	**$72**
Total	**$6,850**	**$7,086**	**$6,905**	**$5,821**	**$6,876**

SOURCE: Texas Education Agency, PEIMS 2003–04.

EXHIBIT A–62
SSAISD AND STATE BUDGETED OPERATING EXPENDITURES
2003–04

| | SOUTH SAN ANTONIO | | STATE | |
FUNCTION (CODE)	BUDGET	PERCENT OF BUDGET	BUDGET	PERCENT OF BUDGET
Instruction (11, 95)	$39,124,412	57.3%	$15,589,243,761	56.6%
Instructional Resources & Media Services (12)	$1,447,228	2.1%	$510,081,260	1.9%
Curriculum and Staff Development (13)	$427,555	0.6%	$298,010,337	1.1%
Instructional Leadership (21)	$1,606,116	2.4%	$361,760,097	1.3%
School Leadership (23)	$4,020,918	5.9%	$1,650,512,661	6.0%
Guidance and Counseling Services (31)	$2,265,487	3.3%	$905,954,996	3.3%
Social Work Services (32)	$310,790	0.5%	$60,895,504	0.2%
Health Services (33)	$961,441	1.4%	$275,916,155	1.0%
Student Transportation (34)	$1,020,903	1.5%	$809,760,319	2.9%
Food Services (35)	$5,149,667	7.5%	$1,564,346,444	5.7%
Co–/Extracurricular Activities (36)	$1,732,781	2.5%	$708,421,970	2.6%
General Administration (41, 92)	$2,320,430	3.4%	$1,123,457,628	4.1%
Plant Maintenance/Operations (51)	$6,428,228	9.4%	$3,103,620,563	11.3%
Security and monitoring services (52)	$725,769	1.1%	$200,272,092	0.7%
Data Processing Services (53)	$716,863	1.1%	$367,534,823	1.3%
Total Operating Expenditures	**$68,258,588**	**100.0%**	**$27,529,788,610**	**100.0%**

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

EXHIBIT A–63
SSAISD INSURANCE COVERAGE
2003–04

COVERAGE	LIMIT	DEDUCTIBLE	COST
Buildings and Contents		$5,000	
Windstorm and Hail	$112,131,246	$25,000	$262,997
Miscellaneous Equipment	$600,000	$1,000	$1,500
Mobile Equipment	$18,500	$1,000	$46
Breakdown of Mechanical Equipment	$50,000,000	$1,000	$7,289
Automobile Physical Damage	Actual Cash Value	Scheduled	$3,534
Computer Systems Equipment	$1,860,000	$1,000/$2,500	$4,650
Employee Dishonesty	$100,000	$10,000	$1,050
Money and Securities	$50,000	$1,000	$175
Forgery or Alteration	$50,000	$1,000	$150
Computer Fraud	$50,000	$1,000	$150
General Liability	$1,000,000	$500	$32,416
Medical Payments	$5,000/$50,000	$500	$7,425
Educators' Legal Liability	$1,000,000	$2,500	$41,860
Automobile Liability	$100,000/$300,000/$100,000	$500	$40,138
Total			**$403,380**

SOURCE: SSAISD, coverage document declarations, May 2004.

EXHIBIT A–64
SSAISD INVESTMENTS BY TYPE
FEBRUARY 2004

INVESTMENT	BALANCE	PERCENT OF TOTAL
Governmental Agencies	$14,836,776	21.1%
Treasury Notes	$2,205,869	3.1%
Texas Daily Pool	$9,399,837	13.3%
TexPool	$12,184,704	17.3%
Lone Star Pool	$24,572,301	34.9%
Wachovia	$23,580	0.0%
MBIA Class	$6,461,749	9.2%
Bank One Sweep	$778,797	1.1%
Total	**$70,463,613**	**100.0%**

SOURCE: SSAISD, quarterly investment report, February 2004.

EXHIBIT A–65
INVESTMENTS BY FUND
FEBRUARY 2004

FUND	AMOUNT	PERCENT OF TOTAL
General Fund	$20,808,154	29.5%
Interest & Sinking Fund	$4,206,379	6.0%
Workers' Compensation Fund	$7,033,287	10.0%
Construction Fund	$7,065	0.0%
Cafeteria Fund	$1,191,125	1.7%
Facilities Emergency Fund	$86,418	0.1%
Public Property Finance Fund	$32,349	0.0%
School Facilities Assistance Program Fund	$266,706	0.4%
Texas Successful Schools Program Fund	$5,415	0.0%
IFA –Construction Fund	$1,981,070	2.8%
IFA – Construction Fund Series 2002	$34,845,644	49.5%
Total	**$70,463,613**	**100.0%**

SOURCE: SSAISD, quarterly investment report, February 2004.

EXHIBIT A–66
SSAISD FOOD SERVICES DEPARTMENT MEALS
2001–02 TO 2003–04

MEAL	2001–02	2002–03	2003–04*
Lunches	1,457,428	1,564,232	1,254,620
Breakfast (Regular)	1,124,109	1,186,660	1,003,191
Breakfast (Severe Need)	866,258	1,039,569	820,464
Average Daily Attendance (ADA)	9,578	9,592	9,459

SOURCE: Texas Education Agency (TEA), Child Nutrition Programs (CNP) District Profiles September 2001 through August 2004.
*NOTE: 2003–04 meals are partial year through April 2004.

EXHIBIT A–67
FOOD SERVICE FEDERAL REVENUE PEER DISTRICT COMPARISON
1999 THROUGH 2003

DISTRICT	1999	2000	2001	2002	2003	PERCENT CHANGE 1999–2003
Mercedes ISD	$1,891,616	$2,134,038	$2,299,967	$2,666,589	$2,727,253	44.2%
Roma ISD	$1,946,092	$2,041,138	$2,214,622	$2,344,138	$2,663,112	36.8%
South San Antonio ISD	**$3,925,980**	**$3,951,062**	**$4,101,948**	**$4,229,678**	**$4,634,766**	**18.1%**
Harlandale ISD	$5,425,884	$5,426,215	$5,521,624	$5,917,437	$6,181,596	13.9%
Edgewood ISD	$4,895,661	$5,046,302	$5,284,344	$5,428,619	$5,538,869	13.1%
Peer Average	**$3,539,813**	**$3,661,923**	**$3,830,139**	**$4,089,196**	**$4,277,708**	**20.8%**

SOURCE: Texas Education Agency, F33 Reports, 1999–2002 and Child Nutrition Program District Profiles, September 2002 through August 2003.
NOTE: Federal revenue does not include United States Department of Agriculture Commodity payments or Summer Feeding program revenues.

EXHIBIT A–68
SSAISD FOOD SERVICES DEPARTMENT
REVENUE AND EXPENDITURES
2000–01 THROUGH 2002–03

REVENUE AND EXPENDITURE CATEGORIES	2000–01 ACTUAL	2001–02 ACTUAL	2002–03 ACTUAL	PERCENT CHANGE
Local	$503,622	$400,716	$ 423,350	(15.9%)
State	52,680	52,205	49,529	(6.0%)
Federal	4,235,080	4,472,711	4,874,992	15.1%
Total Revenues	**$4,791,382**	**$4,925,632**	**$5,347,871**	**11.6%**
Payroll	$1,973,605	$2,029,182	$2,111,813	7.0%
Contracted Services	232,365	375,985	399,634	72.0%
Food and Supplies	2,046,967	2,382,765	2,480,476	21.2%
Other Operating Expenditures	21,132	21,499	5,847	(72.3%)
Capital Outlay	149,483	873,131	30,288	(79.7%)
Total Expenditures	**$4,423,552**	**$5,682,562**	**$5,028,058**	**13.7%**
Net Profit/Loss	**$367,877***	**($756,930)**	**$319,813**	**N/A**
Beginning Fund Balance	$2,294,349	$2,662,226	$1,905,296	N/A
Ending Fund Balance	$2,662,226	$1,905,296	$2,225,109	N/A

SOURCE: SSAISD, Director of Food Services, May 2004, and audited financial reports, 2001, 2002, and 2003.
*NOTE: Net profit for 2000–01 includes $47 of other resources.
N/A denotes not applicable.

EXHIBIT A–69
SSAISD FOOD SERVICES DEPARTMENT ORGANIZATION
2003–04
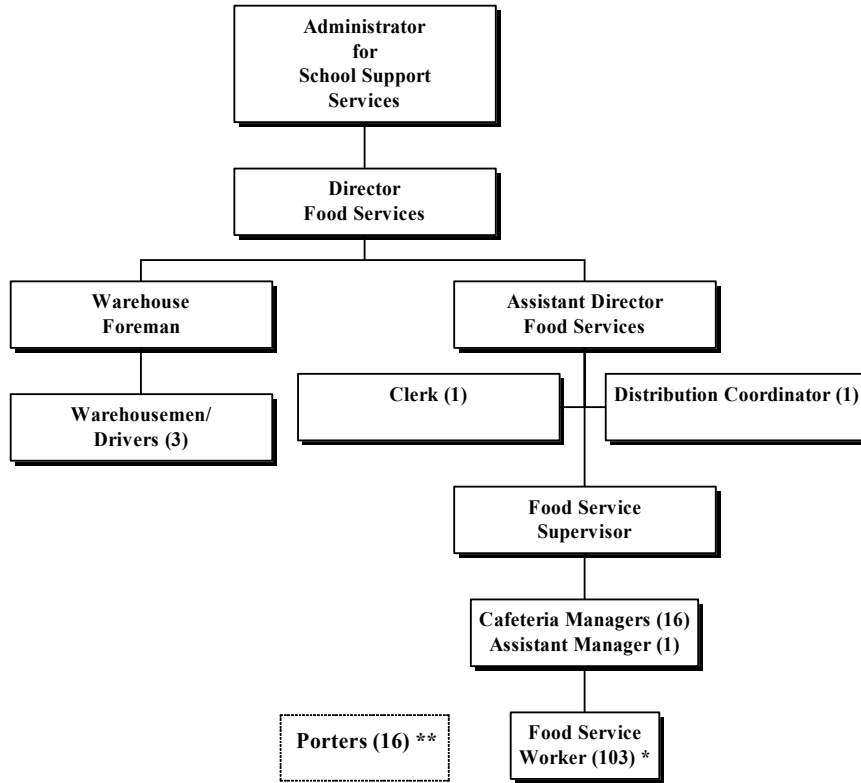
SOURCE: *SSAISD, Food Services Department, May 2004.*
*Food service worker includes floaters and substitutes.
**The Maintenance Department supervises the porters; however, the Food Services Department includes their salaries in its budget.

EXHIBIT A–70
SSAISD FOOD SERVICES DEPARTMENT STAFFING
2003–04

SCHOOL	MANAGER/ ASSISTANT MANAGER	MANAGER TRAINEE	FOOD SERVICE WORKER	PORTER	TOTALS
Alternative School*	1	0	0	0	1
Armstrong Elementary	1	0	6	1	8
Athens Elementary	1	1	5	1	8
Benavidez Elementary	1	0	7	1	9
Carrillo Elementary	1	0	6	1	8
Dwight Middle School	1	1	6	1	9
Five Palms Elementary	1	0	4	1	6
Hutchins Elementary	1	0	7	1	9
Kazen Middle School*	1	1	6	1	9
Kindred Elementary	1	0	6	1	8
Palo Alto Elementary	1	0	7	1	9
Price Elementary	1	0	5	1	7
Royalgate Elementary	1	1	5	1	8
Shepard Middle School	1	1	5	1	8
South San Antonio H.S.	2	0	14	2	18
West H.S. Campus	1	1	4	1	7
Floaters	0	0	4	0	4
Totals	17	6	97	16	136

SOURCE: *SSAISD, Food Services Department, May 2004.*
*The cafeteria manager for Kazen Middle School also serves the alternative school, since staff at Kazen Middle School prepares the meals for the alternative school.

EXHIBIT A–71
SSAISD MEALS PER LABOR HOUR COMPARISON TO INDUSTRY STANDARDS
APRIL 2004

SCHOOL	AVERAGE MEAL EQUIVALENTS SERVED	AVERAGE HOURS WORKED	SSAISD MPLH	INDUSTRY MPLH STANDARD	MPLH VARIANCE OVER/(UNDER)
South San Antonio High School	1,717	113.0	15.2	16*	(0.8)
West High School Campus	899	51.0	17.6	17*	0.6
Dwight Middle School	1,190	60.0	19.8	19	0.8
Shepard Middle School	899	49.0	18.3	18	0.3
Kazen Middle School**	1,183	63.5	18.6	19	(0.4)
Athens Elementary School	833	46.5	17.9	18	(0.1)
Hutchins Elementary School	863	49.0	17.6	18	(0.4)
Kindred Elementary School	761	39.0	19.5	17	2.5
Palo Alto Elementary School	1,057	54.5	19.4	19	0.4
Price Elementary School	828	40.5	20.4	18	2.4
Royalgate Elementary School	824	46.5	17.7	18	(0.3)
Five Palms Elementary School	596	34.0	17.5	15	2.5
Armstrong Elementary School	827	39.5	20.9	18	2.9
Carrillo Elementary School	898	48.5	18.5	18	0.5
Benavidez Elementary School	1,080	55.0	19.6	19	0.6
Totals	**14,455**	**789.5**	**18.3**	**17.8**	**0.5**

SOURCE: SSAISD, director of Food Services, May 2004.
NOTE: Industry standards are from School Foodservice Management for the 21st Century, 5th Edition.
*Industry MPLH for South San Antonio High School were adjusted from 19 to 16 MPLH and West High School was adjusted from 18 to 17 MPLH.
**Kazen Middle School includes meals served for the alternative school.

EXHIBIT A–72
SSAISD PEER DISTRICT FOOD SERVICE BUDGET COMPARISONS
2003–04

EXPENDITURE CATEGORY	SOUTH SAN ANTONIO	EDGEWOOD	HARLANDALE	MERCEDES	ROMA
Salaries and Benefits	$2,504,689	$2,984,288	$4,017,023	$1,318,587	$1,265,550
Contracted Services	$391,777	$482,200	$241,926	$147,000	$204,200
Food and Supplies	$2,302,281	$2,777,124	$3,710,050	$1,601,800	$1,748,000
Other Operating Expenditures	$25,100	$21,876	$36,900	$27,500	$3,320
Capital Outlay	$123,387	$96,000	$52,565	$320,000	$5,000
Total Expenditures	**$5,347,234**	**$6,361,488**	**$8,058,464**	**$3,414,887**	**$3,226,070**
EXPENDITURES AS PERCENT OF TOTAL BUDGET					
Salaries and Benefits	**46.8%**	46.9%	49.8%	38.6%	39.2%
Contracted Services	**7.3%**	7.6%	3.0%	4.3%	6.3%
Food and Supplies	**43.1%**	43.7%	46.0%	46.9%	54.2%
Other Operating Expenditures	**0.5%**	0.3%	0.5%	0.8%	0.1%
Capital Outlay	**2.3%**	1.5%	0.7%	9.4%	0.2%
EXPENDITURES PER STUDENT					
Enrollment	9,928	12,873	14,072	5,329	6,222
Expenditures per student	**$539**	$494	$573	$641	$518

SOURCE: Texas Education Agency, PEIMS, 2003–04.
NOTE: Percentages may not total to 100 percent due to rounding. State and REGION 20 are not available.

EXHIBIT A–73
SSAISD PEER DISTRICT COMPARISON
AVERAGE ANNUAL MEAL PARTICIPATION RATES
2001–02 TO 2003–04

DISTRICT	SOUTH SAN ANTONIO	EDGEWOOD	HARLANDALE	ROMA	MERCEDES
BREAKFAST PARTICIPATION RATES					
2001–02	68.24%	57.85%	51.80%	50.34%	78.68%
2002–03	70.69%	45.46%	65.07%	63.77%	88.78%
2003–04*	75.77%	56.87%	89.95%	83.15%	92.45%
LUNCH PARTICIPATION RATES					
2001–02	88.46%	85.58%	70.47%	80.90%	80.76%
2002–03	93.18%	82.40%	84.29%	85.34%	87.37%
2003–04*	94.78%	88.69%	87.59%	90.49%	89.97%

SOURCE: Texas Education Agency, Child Nutrition Programs District Profile Reports for SSAISD and peer districts, 2001–02, 2002–03, and 2003–04.
*NOTE: 2003–04 data represent averages for participation rates from September 2003 through March 2004.

EXHIBIT A–74
FOOD SERVICE SURVEY RESULTS
MAY 2004

SURVEY QUESTION	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE
The cafeteria's food looks and tastes good.					
Teachers	6.5%	43.5%	14.4%	23.8%	9.1%
Students	0.7%	17.5%	29.2%	21.2%	30.7%
Parents	5.1%	25.6%	20.5%	25.6%	20.5%
Principals	26.9%	46.2%	7.7%	19.2%	0.0%
Food is served warm.					
Teachers	9.7%	61.5%	10.9%	10.0%	5.3%
Students	1.5%	32.1%	24.1%	28.5%	12.4%
Parents	10.3%	41.0%	17.9%	12.8%	15.4%
Principals	30.8%	61.5%	3.8%	3.8%	0.0%
Students have enough time to eat.					
Teachers	N/A	N/A	N/A	N/A	N/A
Students	4.4%	32.8%	13.1%	26.3%	21.9%
Parents	10.3%	41.0%	5.1%	28.2%	15.4%
Principals	34.6%	65.4%	0.0%	0.0%	0.0%
Students wait in food lines no longer than ten minutes.					
Teachers	15.0%	58.8%	11.2%	8.8%	3.8%
Students	6.6%	26.3%	16.1%	30.7%	19.7%
Parents	10.3%	30.8%	17.9%	33.3%	7.7%
Principals	34.6%	61.5%	3.8%	0.0%	0.0%
Cafeteria staff is helpful and friendly.					
Teachers	23.8%	51.2%	8.8%	7.9%	5.6%
Students	10.9%	34.3%	21.9%	19.7%	11.7%
Parents	10.3%	53.8%	17.9%	15.4%	2.6%
Principals	38.5%	53.8%	3.8%	3.8%	0.0%
Cafeteria facilities are sanitary and neat.					
Teachers	24.1%	58.5%	7.6%	5.0%	2.4%
Students	10.2%	30.7%	33.6%	13.9%	9.5%
Parents	7.7%	69.2%	15.4%	2.6%	5.1%
Principals	42.3%	53.8%	3.8%	0.0%	0.0%

SOURCE: SSAISD School Review Surveys, May 2004.
NOTE: Percentages may not add to 100 percent due to "no responses."

EXHIBIT A–75
LINEAR DENSITY GROUPS
MAY 2003

LINEAR DENSITY GROUP	ALLOTMENT/MILE
2.40 and above	$1.43
1.65 to 2.40	$1.25
1.15 to 1.65	$1.11
0.90 to 1.15	$0.97
0.65 to 0.90	$0.88
0.40 to 0.65	$0.79
Up to 0.40	$0.68

SOURCE: Texas Education Agency, Handbook on School Transportation Allotments (revised), May 2004.

EXHIBIT A–76
LINEAR DENSITY
SSAISD AND PEER DISTRICTS
2002–03

DISTRICT	STANDARD REGULAR RIDERS*	STANDARD REGULAR MILES	LINEAR DENSITY	ALLOTMENT/ MILE BASED ON 2001–02**
Edgewood ISD	39,960	16,319	2.449	$1.25
Harlandale ISD	151,380	92,677	1.633	$1.25
Mercedes ISD	223,560	284,436	0.786	$0.88
Roma ISD	405,360	422,425	0.960	$0.97
Peer Average	205,065	203,964	1.005	$1.09
South San Antonio ISD	370,980	84,180	4.407	$1.43

SOURCE: Texas Education Agency, School Transportation Route Services Reports, 2002–03.
* Annual riders calculated by multiplying average daily riders by 180 school days.
** Allotment rates are based on the previous year's linear density.

EXHIBIT A–77
OPERATING STATISTICS
SSAISD AND PEER DISTRICTS
2002–03

DISTRICT	REGULAR PROGRAM			SPECIAL PROGRAM		
	ANNUAL RIDERS*	TOTAL ODOMETER MILES	TOTAL BUSES	ANNUAL RIDERS*	TOTAL ODOMETER MILES	TOTAL BUSES
Edgewood ISD	108,180	125,887	12	39,240	95,678	20
Harlandale ISD	278,820	429,561	38	62,100	166,631	16
Mercedes ISD	294,660	432,033	38	9,360	68,832	4
Roma ISD	445,860	548,128	54	8,640	93,718	6
Peer Average	281,880	383,902	36	29,835	106,215	12
South San Antonio ISD	399,780	150,216	19	45,000	154,910	15

SOURCE: Texas Education Agency, School Transportation Operations Report and School Transportation Route Services Report, 2002–03.
* Annual riders calculated by multiplying average daily riders by 180 school days.

EXHIBIT A–78
COST EFFICIENCY AND EFFECTIVENESS INDICATORS
SSAISD AND PEER DISTRICTS
2002–03

DISTRICT	REGULAR PROGRAM		SPECIAL PROGRAM	
	COST/ODOMETER MILE	COST/RIDER	COST/ODOMETER MILE	COST/RIDER
Edgewood ISD	$3.08	$3.58	$5.20	$12.68
Harlandale ISD	$3.22	$4.96	$5.53	$14.84
Mercedes ISD	$2.87	$4.21	$2.49	$18.35
Roma ISD	$2.22	$2.73	$0.97	$10.57
Peer Average	$2.85	$3.87	$3.55	$14.11
South San Antonio ISD	$3.18	$1.19	$2.20	$7.56
Percent Different From Peer Average	12%	(69%)	(38%)	(46%)

SOURCE: Texas Education Agency, School Transportation Operations Report and School Transportation Route Services Report, 2002–03.

EXHIBIT A–79
SERVICE EFFECTIVENESS INDICATORS
SSAISD AND PEER DISTRICTS
2002–03

DISTRICT	REGULAR PROGRAM		SPECIAL PROGRAM	
	RIDERS/ROUTE MILE (WITH DEADHEAD)	RIDERS/BUS	RIDERS/ROUTE MILE (WITH DEADHEAD)	RIDERS/BUS
Edgewood ISD	1.54	50	0.42	11
Harlandale ISD	0.79	41	0.38	22
Mercedes ISD	0.76	43	0.14	13
Roma ISD	1.00	46	0.09	8
Peer Average	1.02	45	0.26	13
South San Antonio ISD	3.07	117	0.36	17
Percent Different From Peer Average*	200%	160%	38%	25%

SOURCE: Texas Education Agency, School Transportation Operations Report and School Transportation Route Services Report, 2002–03.
* Some number variations due to rounding.

EXHIBIT A–80
SSAISD REGULAR AND SPECIAL PROGRAM TRANSPORTATION COST DATA
1998–99 THROUGH 2002–03

	1998–99	1999–2000	2000–01	2001–02	2002–03	PERCENT CHANGE 1998–2003
OPERATION COST*						
Regular Program	$484,620	$487,385	$466,166	$408,992	$477,160	(2%)
Percent Change	N/A	1%	(4%)	(12%)	17%	N/A
Special Program	$276,080	$244,647	$246,692	$215,011	$340,418	23%
Percent Change	N/A	(11%)	1%	(13%)	58%	N/A
Total	$760,700	$732,032	$712,858	$624,003	$817,578	7%
ODOMETER MILES						
Regular Program	151,393	131,196	130,275	153,060	150,216	(1%)
Percent Change	N/A	(13%)	(1%)	17%	(2%)	N/A
Special Program	144,515	93,633	113,234	178,496	154,910	7%
Percent Change	N/A	(35%)	21%	58%	(13%)	N/A
Total	295,908	224,829	243,509	331,556	305,126	3%
COST PER ODOMETER MILE*						
Regular Program	$3.20	$3.71	$3.58	$2.67	$3.18	(1%)
Percent Change	N/A	16%	(4%)	(25%)	19%	N/A
Special Program	$1.91	$2.61	$2.18	$1.20	$2.20	15%
Percent Change	N/A	37%	(16%)	(45%)	83%	N/A
ANNUAL RIDERS						
Regular Program	383,220	380,700	382,320	394,740	399,780	4%
Percent Change	N/A	(1%)	0%	3%	1%	N/A
Special Program	50,220	46,620	42,120	49,860	45,000	(10%)
Percent Change	N/A	(7%)	(10%)	18%	(10%)	N/A
Total	433,440	427,320	424,440	444,600	444,780	3%
COST PER RIDER*						
Regular Program	$1.26	$1.28	$1.22	$1.04	$1.19	(6%)
Percent Change	N/A	2%	(5%)	(15%)	14%	N/A
Special Program	$5.50	$5.25	$5.86	$4.31	$7.56	37%
Percent Change	N/A	(5%)	12%	(26%)	75%	N/A

SOURCE: Texas Education Agency, School Transportation Operations Report and School Transportation Route Services Report, 1998–99 through 2002–03.
*Operation costs exclude capital outlay and debt service.

EXHIBIT A–81
SSAISD TRANSPORTATION OPERATION COST BY TYPE OF EXPENDITURE
1998–99 THROUGH 2002–03

OBJECT	1998–99	1999–2000	2000–01	2001–02	2002–03	PERCENT OF TOTAL 2002–03	PERCENT CHANGE FROM 1998–99 TO 2002–03
Salaries and Benefits	$660,569	$616,209	$597,643	$522,960	$635,596	78%	(4%)
Percent Change from Pervious Year	N/A	(7%)	(3%)	(12%)	22%	N/A	N/A
Purchased Services	$23,414	$30,645	$26,060	$18,950	$37,165	5%	59%
Percent Change from Pervious Year	N/A	31%	(15%)	(27%)	96%	N/A	N/A
Supplies and Material	$65,950	$76,184	$78,994	$70,812	$103,540	13%	57%
Percent Change from Previous Year	N/A	16%	4%	(10%)	46%	N/A	N/A
Other Expenses	$10,767	$8,994	$10,161	$11,281	$41,277	5%	283%
Percent Change from Previous Year	N/A	(16%)	13%	11%	266%	N/A	N/A
Total Cost	$760,700	$732,032	$712,858	$624,003	$817,578	N/A	7%

SOURCE: Texas Education Agency, School Transportation Route Services Reports, 1997–98 through 2002–03.

EXHIBIT A–82
SCHOOL BUS FLEET
APRIL 2004

MODEL YEAR	AGE IN YEARS	NUMBER OF BUSES*
1988	15	1
1991	12	3
1992	11	2
1993	10	2
1994	9	2
1995	8	2
1997	9	2
1998	5	4
1999	4	1
2000	3	1
2002	1	6
Total/Average	**8**	**26**

SOURCE: SSAISD, Transportation Department Fleet List, April 2004.

*Total exclude the Life skills and Parenting buses because they are not used in normal route service.

APPENDIX B
COMMUNITY OPEN HOUSE AND
FOCUS GROUP COMMENTS

As part of the review process, the review team held a community open house and various focus groups to obtain input. During the community open house parents, teachers, and community members participated by writing personal comments about the major review areas; and in some cases, talking in person to review team members. Teachers, principals, community leaders, and parents also participated in small focus groups to discuss the areas under review.

Comments below illustrate community perceptions of SSAISD and do not reflect the findings and/or opinions of the Legislative Budget Board or the review team. The following comments are organized by area of review.

EDUCATIONAL SERVICE DELIVERY

- I feel that the migrant program has successfully provided needed services for its students.

- Too much focus is placed on TAKS – constricting teachers' ability to provide a whole curriculum.

- Curriculum should fit the students. Students shouldn't be placed in situations they can't handle or succeed. Special education students must have their own place and should not be mainstreamed. Dropout prevention is important.

- Kindergarten curriculum in our district is inappropriate for young children. These children should be made to take district assessments. The Open Court reading program used at many schools does not allow for the needs and abilities of young students. I feel that kindergarten students are stressed by the curriculum imposed on them.

- An integrated curriculum should be used at all grade levels. It is better suited for addressing various subject areas. There is too much assessment and not enough teaching taking place, not through any fault of the teacher, but mandated by the district. When does a teacher have time to teach if she's always preparing for an assessment?

- The alternative school should be stricter. The kids are having too much fun there.

- Our gifted students are sadly neglected. The programs are not sufficient to meet their needs. Each campus should have a G/T teacher who pulls out students to service them. The G/T curriculum currently offered is not challenging

enough. Students are not exposed to the types of programs/networks that will allow them to nurture their talents.

- Our district does not allow any recess time for grades 1–5. Why? Because testing rules their little lives. I recommend a minimum of 15 minutes for recess for all elementary grades. Young children (four year olds) should be allowed naptime in order to allow their growing bodies time to rest. Currently, naptime is forbidden.

- I would like to see our children taught theater arts and more music. I'd like to see our lower grade levels tested less with these district assessments. Our teachers did not have a vote on changing the number of days for testing like the superintendent said they would. Decisions were made from another level and calendars were distributed to teachers. The decision is left now to the principals at each campus to continue assessing. Of course, our principal (Carillo Elementary) insists on adding back days to give these district assessments. I feel it is important to better prepare our little ones by teaching them and not assessing so much.

BOARD GOVERNANCE

- I have had concerns brought forth to the school board this school year. The board members did work with me on trying to resolve my issues with the district. It was at the superintendent's level that I was very disappointed. I was not given straightforward answers and was misled a lot. I have requested and no meeting has been set to discuss and resolve my issues. I feel as a parent that many things are purposely kept from the parents—even when inquiring about something within our campus or district. Fingers are pointed every which way, and no direct answer is given to my satisfaction.

- It makes me sad. It makes me angry. Our school board must realize that our children need them to do what is right and just. Their future is in their hands. The bickering within the board must end. This has gone on too long, and the reputation of our district has suffered.

- Board will always need up-to-date training to understand the ramifications of current laws and new laws and govern accordingly and not by petty policies. Superintendent is very well versed, understands finance. He earmarked money in appropriate departments. School management needs wholesale improvements.

Put fully qualified people in each and every class and each and every subject taught. Do not mainstream special education students. Travel—hold expenses to the limit by law.

▪ The media (TV & Print) has reported exaggerated and irresponsible expenditures by the present board majority. Have you found this to be true? If so, will such instances be made known to the South San Community before politicians put their fingerprints on such report, however it turns out? What merits a state audit of SSAISD over 1,000 school districts? With a price tag of $175,000?

▪ The board has directed attorneys to oversee all legal work, including work contracted under Special Ed department with another firm. Why the duplication? Several amendments to the budget have been made to provide more monies to the attorneys for legal work within this fiscal year and then there are contributions by the same attorneys to candidates and board members for campaigns. Check CIEs of board members and candidates.

PURCHASING AND ACQUISITION MANAGEMENT

▪ The schools are provided with proper computers, technology, etc. The district deserves an A minus in that department.

▪ I feel that some books are too old, but we could probably have better storage for them while school is out. But I also suggest that when a student gets issued a book and he/she writes on it, they should pay a fine because these books are not cheap and these kids need to learn some responsibility! They need better books then maybe this could help everyone!

▪ I'd like parents to be notified of books our children are using and know that all books are being used. That each book is being used for every subject and that every subject is being taught for Carillo and throughout district.

▪ Supplies used by the teachers and students should be of good quality. Buying inferior, yet cheap, goods costs everyone more in the long run.

DISTRICT MANAGEMENT AND COMMUNITY RELATIONS

▪ Administration needs to be more streamlined so that teachers can be more involved in the decision–making process

▪ Site–Based Decision–Making (SBDM)? I don't know what this is. I wish they could be a little more specific to let us know what this is or means!

▪ I feel the superintendent is doing an adequate job. He has a lot of work ahead of him, as I feel our district is in need of many improvements. He is approachable and a good listener.

▪ Accounting on a statewide basis.

▪ Fair taxation across the board—close business loopholes.

▪ SBDM: I am aware of such committee, because I have been asked to serve. At our campus (Carillo) parents should know what is offered at their campus, and information of meetings should be posted for them. I was not satisfied with the whole process. At the end, the principal makes the decision, and the same teachers do not attend at each meeting throughout the school year. I'd like to see a more uniform process and a team–working atmosphere.

▪ We are given our school's handbook of policies at the beginning of each school year. We are also given notice of any new policies that come up throughout the year.

▪ I'd like to be more informed about our campus (Carillo). I see division within other elementary teachers that is unnecessary. I see a lot of unhappy teachers. I am aware of many grievances at our campus, and I'd like to know why. I know such things cannot be spoken, because of legal matters, but I do not appreciate losing good teachers and finding out after the fact. The children of this community rely on the stability of our school and nurturing these teachers give. Not only should the teachers be working as a team, but as a team with parents and the principal. They should be united and not divided.

▪ A parent should not feel intimidated by anyone at this district. Some parents may not agree with a lot, but there are those that do and are ready to commit to be involved at their campus.

▪ I'd like to see specifics on flyers to parents. The flyer for this evening was misleading. I was prepared to speak and talk about my comments and concerns. This process is less intimidating, and I feel I can be more open without hesitation. If this process could be noted to parents, I would expect a better turn out.

▪ The district works well to cooperate with Palo Alto College to provide information and opportunities for education to its students and families.

- Parental involvement is not what it should be. We'd like to see more parents get involved in a true sense of having a part in how this district should operate.

- I think the schools should try a bit harder to try and help the PTA try to get more people to go to the PTA meetings. I, as a parent, get involved with the schools. The PTA meetings hardly have a good turn out. I think we need to push a bit harder to try and get parents out there. I go to every PTA meeting at my kids' schools, and it's so sad that several times I am the only parent there at the meeting with of course the exception of the officers. I just wish we could get more parents involved.

- I'd like to see our law enforcement on a regular basis at each campus reminding our community of safety rules (seat belts, car seats, school zones etc).

- This is the first time I have heard of such a meeting in the three years my children have been in school (Carillo). I'd like to see more opportunities like this to voice our concerns and comments without intimidation. I'd like the district to find ways of notifying parents other than a flyer from school. Parents I spoke with from our campus, Dwight and South San HS did not receive notice of this performance review. I'd like to be notified with more than a couple of days notice. I'd also like to see this process brought to us, the parents, to our campus. With the exception of children riding home on the bus, all other parents or family members come pick–up their children at school (because there is no after–school care this time of year).

FACILITIES MANAGEMENT AND SAFETY OPERATIONS

- The custodial services in SSAISD are probably the worst in Texas. The schools look horrible. The bathrooms are unsanitary. Custodians are poorly paid and treated. Therefore, SSAISD is not attracting the hardest workers. It is a joke amongst teachers as to who has the laziest janitors or dirtiest classroom. I know of one teacher who is leaving the district because she is sick and tired of working in a filthy environment.

- Taxpayers in our district are not getting their money's worth in this area. Schools are poorly built and renovated. Compare the renovation of SSA High School to that of Jay High School in the NSISD. How can one school look so nice and another school like there was never any

work done. Take a look at Kindred and its recent renovation. Our kids deserve clean, modern facilities that motivate them to attend school and increase community pride.

- When I think of this category I think of SAISD. They have been able to create brand new facilities by the old ones. When the project is completed what is left? A beautiful new campus. We cannot just keep bandaging the problem. Put a new wing here, a different looking new wing there…. What do you have? An ugly school. What is needed is VISION. A vision of what could be and is best for the students.

- Simple maintenance tasks such as fixing a leaky faucet or sink take way too long. If there is one sink in a restroom and it is out of order, where should the kids wash their hands?

- I feel that some of the schools could be a bit cleaner and fixed. Some of the schools are pretty old, and they need new doors or better classrooms or even bigger. Some of the cafeterias are too small for some of the SSAISD, and some are still too dirty!

- I am very pleased with our custodial family at our campus. I'd like to see the district's custodial/maintenance department at the schools on a regular basis, not necessarily when there's a work order. Yards at our school should be the district's responsibility to keep up with, not the parents or staff of each school. Plumbing areas could also be kept up with at each campus on a regular basis.

- Our buildings are fair. They do need some work to them.

- I understand that the Health Service Director's office was vandalized…equipment, data, etc. What was done? What action has been taken/remedy to secure confidential records, taxpayers' cost, etc. Are SAPD reports made? How do we recover cost?

- I'd like to see posted or distributed laws or guidelines of fire drills, schedules, time, and day for Carillo, as well as throughout the district.

- I am concerned with the security of schools with regards to break-ins and theft. I am not confident that our security, within the district, is adequate in helping to minimize theft.

COMPUTERS AND TECHNOLOGY

- I'm glad my child's school has a computer lab, but the instruction needs focus. Is there an elementary computer curriculum?

- I'd like everyone in the district to keep up with the technology. We owe it to our children not to stay behind.

- I feel that compared to students in other districts, SSAISD students are not exposed to the training.

- Have concerns about how the director of the technology department selects vendors. Have concerns about not having enough manpower within the district to troubleshoot what is already in place. Have concerns about being behind in software/hardware needs.

- State should provide each student with computer in classroom.

- I feel that compared to students in other school districts, SSAISD is not sufficiently given adequate training in using computers, nor are they given enough computers to work with. Having discussed the types of classes given involving computers, SSAISD sadly lags behind. There are not enough computers made available to the students. Students in other districts are given more opportunities to use their knowledge of computers in homework assignments. We are not preparing the students of SSAISD to be competitive with other students in San Antonio.

HUMAN RESOURCES MANAGEMENT

- Salaries should be more competitive with surrounding districts.

- I think that SSAISD should pay a bit more to their substitutes. I feel that they work just as hard as the teachers and should get paid just a bit more—especially, if they are long–term substitutes. Even the staff should get a bit more. I feel that the teachers really work pretty hard with the students.

- Must have fully qualified and fully certified teachers only. State level has the minimum salary scale $5,000 below national average and for a teacher at step 20, it is $12,000 below national average (it's outdated). Salary structure should be $800 between steps for 0–30. Need a 30-step structure to reward experience.

- Salary for teachers, custodians, and other paraprofessionals is not good! Other districts pay much more and reward their employees.

FINANCIAL AND RISK MANAGEMENT

- All schools need to be on the same accounting codes to where everything is accountable and

accurate, and no red flags pop up. Accounting practices must be universal and all on the same page.

- We need the district to stay within a budget. Planning ahead is the key to good management. Money should go to keeping good teachers!

- I'd like to see audits at any given time without notice throughout each campus and district. I'd also like to see individuals throughout each campus questioned and observed by the auditors.

- I cannot say that I have much confidence in the financial management in SSAISD. I do not feel that monies are spent equitably by the school board. I feel that schools closer to IH–35 are given more consideration than those close to Highway 90.

- Health Insurance is important to teachers. They need to provide better coverage at a lesser expense for teachers. Again reward by taking care of your staff.

- Cash inflow and outflow must be watched. Investment should be in safe funds, not high risk ones in which investment is lost. Early retirement funds need to be built up for future years by wise study and investment in reputable funds.

- Health insurance has become too costly to the employee and especially if he is on the family plan. Contributing cost is always a concern but insurance should never be misused or abused as that causes excessive rise in insurance premiums. The school district should help employees by paying more of the health plan. Should get more bang for the buck.

- A healthy employee is a hardworking employee. I feel you get what you create. Create an environment that suits the healthcare needs of its employees, and you just might attract employees who will be an asset to the district. Provide poor health insurance, and good teachers will go elsewhere.

FOOD SERVICES

- I feel that some schools, if not all, could do a better job with the food. Salads are very small, and their boiled eggs are frozen. I know because I went to eat with my child. Some of the prices are way too high for the foods they sell.

- I am pleased with most of the areas under food services. However, I feel that there are too many carbs on the menu. I also feel that all food items offered on the menu should be put on the

students' trays. Students are more likely to eat a vegetable or fruit if it is placed on their tray than if they choose only the food they like which is not the healthiest choice.

- Diabetics: Is Food Services addressing this crucial health epidemic (lower carbs, etc)?

STUDENT TRANSPORTATION

- I'd like to see bus aides in the school buses for our children's safety.

- Minimizing idling time by buses waiting—using gas a lot. Paying bus mechanics well so they will stay with the district. Purchase of new buses should be on a low maintenance feature and guarantee.

- I feel there should be a set schedule of fees for field trips to such basic destinations as the museum, zoo, Sea World. Teachers should not have to guess how much they will be billed for a field trip. The price for a field trip should not vary, and yet I've seen two different grade levels go to the same destination and be charged differently.

- All student groups involved in extracurricular activities (Football, Band, Pep Squad, etc) that need transportation to/from activity sites (in–town or out–of–town) have been having to charter buses instead of using district school buses. The cost to use charter transportation far exceeds the cost of overtime for within district drivers to transport students using available district school buses. Even adding the cost of fuel, it is still cheaper than a chartered bus. Charter transportation is a waste of the district's financial resources.

- The district needs new buses. Money should be used to buy buses where students have A/C and are comfortable.

- Our school buses are disgraceful. On a field trip to the rodeo one cold, rainy February morning with 60 four-year olds, I can attest that a bus with no heating, with graffiti written all over it, with torn upholstery and exposed upholstery springs is not worthy of any child. Not only did this bus belong in a junkyard, but screws were missing that bolted the window frames to the shell of the bus. The teachers on the bus had to stand and hold the frame to the shell as water sprayed in, moving children to the few dry areas on the bus. By the time the children arrived they were damp and chilled. Most often drivers must be instructed by the teachers how to arrive to a particular destination because the drivers have no idea how to get to places, such as the zoo or rodeo grounds. Yet, we have to pay them.

APPENDIX C
PARENT SURVEY RESULTS
N = 39

PART A: DEMOGRAPHIC DATA
Note: Percentages may not equal 100 due to rounding or multiple responses.

STATEMENT	CATEGORY		
	NO RESPONSE	MALE	FEMALE
1. Gender (Optional)	0.0%	23.1%	76.9%

STATEMENT	CATEGORY					
	NO RESPONSE	ANGLO	AFRICAN-AMERICAN	HISPANIC	ASIAN	OTHER
2. Ethnicity (Optional)	2.6%	7.7%	0.0%	87.2%	2.6%	0.0%

STATEMENT	CATEGORY			
	NO RESPONSE	0-5 YEARS	6-10 YEARS	11 OR MORE YEARS
3. How long have you lived in South San Antonio ISD?	2.6%	20.5%	25.6%	51.3%

STATEMENT	CATEGORY			
	GRADE LEVEL		GRADE LEVEL	
4. What grade level(s) does your child(ren) attend?	Pre-Kindergarten	5.1%	Sixth Grade	30.8%
	Kindergarten	10.3%	Seventh Grade	25.6%
	First Grade	23.1%	Eighth Grade	33.3%
	Second Grade	12.8%	Ninth Grade	20.5%
	Third Grade	23.1%	Tenth Grade	12.8%
	Fourth Grade	7.7%	Eleventh Grade	17.9%
	Fifth Grade	7.7%	Twelfth Grade	10.3%

PART B: SURVEY QUESTIONS
A. DISTRICT ORGANIZATION AND MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
1. The school board allows sufficient time for public input at meetings.	5.1%	46.2%	20.5%	15.4%	10.3%	2.6%
2. School board members listen to the opinions and desires of others.	0.0%	48.7%	23.1%	17.9%	5.1%	5.1%
3. The superintendent is a respected and effective instructional leader.	7.7%	46.2%	28.2%	10.3%	5.1%	2.6%
4. The superintendent is a respected and effective business manager.	5.1%	38.5%	35.9%	15.4%	2.6%	2.6%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
5. The district provides a high quality of services.	2.6%	43.6%	20.5%	20.5%	7.7%	5.1%
6. Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	5.1%	38.5%	28.2%	17.9%	7.7%	2.6%
7. The needs of the college-bound student are being met.	0.0%	41.0%	23.1%	23.1%	7.7%	5.1%
8. The needs of the work-bound student are being met.	2.6%	41.0%	30.8%	17.9%	2.6%	5.1%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT (CONTINUED)

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
9. The district has effective educational programs for the following:						
a. Reading	7.7%	71.8%	7.7%	5.1%	2.6%	5.1%
b. Writing	7.7%	71.8%	7.7%	7.7%	2.6%	2.6%
c. Mathematics	10.3%	66.7%	7.7%	10.3%	2.6%	2.6%
d. Science	7.7%	69.2%	10.3%	7.7%	2.6%	2.6%
e. English or Language Arts	7.7%	69.2%	10.3%	7.7%	2.6%	2.6%
f. Computer Instruction	7.7%	66.7%	12.8%	7.7%	2.6%	2.6%
g. Social Studies (history or geography)	7.7%	71.8%	10.3%	5.1%	2.6%	2.6%
h. Fine Arts	7.7%	56.4%	17.9%	5.1%	10.3%	2.6%
i. Physical Education	7.7%	74.4%	5.1%	5.1%	5.1%	2.6%
j. Business Education	2.6%	38.5%	41.0%	7.7%	5.1%	5.1%
k. Vocational (Career and Technology) Education	5.1%	48.7%	30.8%	5.1%	5.1%	5.1%
l. Foreign Language	2.6%	43.6%	28.2%	7.7%	12.8%	5.1%
10. The district has effective special programs for the following:						
a. Library Service	5.1%	66.7%	15.4%	7.7%	2.6%	2.6%
b. Honors/Gifted and Talented Education	10.3%	59.0%	17.9%	5.1%	5.1%	2.6%
c. Special Education	10.3%	53.8%	28.2%	5.1%	0.0%	2.6%
d. Head Start and Even Start programs	7.7%	59.0%	23.1%	7.7%	0.0%	2.6%
e. Dyslexia program	2.6%	28.2%	46.2%	10.3%	7.7%	5.1%
f. Student mentoring program	5.1%	53.8%	23.1%	12.8%	0.0%	5.1%
g. Advanced placement program	5.1%	48.7%	33.3%	5.1%	2.6%	5.1%
h. Literacy program	2.6%	43.6%	35.9%	10.3%	2.6%	5.1%
i. Programs for students at risk of dropping out of school	5.1%	35.9%	38.5%	7.7%	7.7%	5.1%
j. Summer school programs	7.7%	59.0%	20.5%	7.7%	0.0%	5.1%
k. Alternative education programs	2.6%	51.3%	33.3%	2.6%	5.1%	5.1%
l. "English as a second language" program	2.6%	59.0%	20.5%	10.3%	2.6%	5.1%
m. Career counseling program	2.6%	43.6%	35.9%	10.3%	2.6%	5.1%
n. College counseling program	2.6%	33.3%	35.9%	17.9%	2.6%	7.7%
o. Counseling the parents of students	5.1%	35.9%	23.1%	17.9%	10.3%	7.7%
p. Drop out prevention program	2.6%	35.9%	38.5%	10.3%	5.1%	7.7%
11. Parents are immediately notified if a child is absent from school.	17.9%	53.8%	7.7%	10.3%	7.7%	2.6%
12. Teacher turnover is low.	7.7%	35.9%	25.6%	15.4%	12.8%	2.6%
13. Highly qualified teachers fill job openings.	10.3%	43.6%	25.6%	12.8%	5.1%	2.6%
14. A substitute teacher rarely teaches my child.	7.7%	51.3%	12.8%	20.5%	5.1%	2.6%
15. Teachers are knowledgeable in the subject areas they teach.	5.1%	66.7%	17.9%	7.7%	0.0%	2.6%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT (CONTINUED)

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
16. All schools have equal access to educational materials such as computers, television monitors, science labs, and art classes.	7.7%	43.6%	12.8%	17.9%	10.3%	7.7%
17. Students have access, when needed, to a school nurse.	23.1%	51.3%	2.6%	10.3%	5.1%	7.7%
18. Classrooms are seldom left unattended.	12.8%	43.6%	10.3%	20.5%	5.1%	7.7%
19. The district provides a high-quality education.	7.7%	51.3%	12.8%	10.3%	10.3%	7.7%
20. The district has a high quality of teachers.	7.7%	56.4%	7.7%	17.9%	2.6%	7.7%

C. COMMUNITY INVOLVEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
21. The district regularly communicates with parents.	7.7%	51.3%	0.0%	17.9%	15.4%	7.7%
22. District facilities are open for community use.	5.1%	53.8%	10.3%	23.1%	0.0%	7.7%
23. Schools have plenty of volunteers to help students and school programs.	2.6%	38.5%	15.4%	28.2%	7.7%	7.7%

D. FACILITIES USE AND MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
24. Parents, citizens, students, faculty, staff, and the board provide input into facility planning.	5.1%	35.9%	23.1%	15.4%	15.4%	5.1%
25. Schools are clean.	7.7%	56.4%	7.7%	7.7%	15.4%	5.1%
26. Buildings are properly maintained in a timely manner.	5.1%	48.7%	15.4%	12.8%	12.8%	5.1%
27. Repairs are made in a timely manner.	2.6%	48.7%	15.4%	15.4%	10.3%	7.7%
28. The district uses very few portable buildings.	10.3%	43.6%	17.9%	20.5%	2.6%	5.1%
29. Emergency maintenance is handled expeditiously.	7.7%	41.0%	17.9%	20.5%	7.7%	5.1%

E. ASSET AND RISK MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
30. My property tax bill is reasonable for the educational services delivered.	2.6%	38.5%	25.6%	23.1%	7.7%	2.6%
31. Board members and administrators do a good job explaining the use of tax dollars.	2.6%	25.6%	20.5%	30.8%	15.4%	5.1%

F. FINANCIAL MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
32. Site-based budgeting is used effectively to extend the involvement of principals and teachers.	10.3%	30.8%	41.0%	10.3%	5.1%	2.6%
33. Campus administrators are well trained in fiscal management techniques.	5.1%	35.9%	41.0%	10.3%	5.1%	2.6%
34. The district's financial reports are easy to understand and read.	5.1%	25.6%	38.5%	23.1%	7.7%	0.0%
35. Financial reports are made available to community members when asked.	0.0%	33.3%	38.5%	12.8%	12.8%	2.6%

G. PURCHASING AND WAREHOUSING

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
36. Students are issued textbooks in a timely manner.	10.3%	66.7%	12.8%	2.6%	7.7%	0.0%
37. Textbooks are in good shape.	2.6%	69.2%	12.8%	5.1%	10.3%	0.0%
38. The school library meets student needs for books and other resources.	10.3%	64.1%	10.3%	12.8%	2.6%	0.0%

H. FOOD SERVICES

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
39. My child regularly purchases his/her meal from the cafeteria.	10.3%	30.8%	5.1%	23.1%	23.1%	7.7%
40. The school breakfast program is available to all children.	48.7%	38.5%	5.1%	0.0%	5.1%	2.6%
41. The cafeteria's food looks and tastes good.	5.1%	25.6%	20.5%	25.6%	20.5%	3.6%
42. Food is served warm.	10.3%	41.0%	17.9%	12.8%	15.4%	2.6%
43. Students have enough time to eat.	10.3%	41.0%	5.1%	28.2%	15.4%	0.0%
44. Students eat lunch at the appropriate time of day.	10.3%	56.4%	0.0%	25.6%	7.7%	0.0%
45. Students wait in food lines no longer than 10 minutes.	10.3%	30.8%	17.9%	33.3%	7.7%	0.0%
46. Discipline and order are maintained in the school cafeteria.	17.9%	56.4%	15.4%	10.3%	0.0%	0.0%
47. Cafeteria staff is helpful and friendly.	10.3%	53.8%	17.9%	15.4%	2.6%	0.0%
48. Cafeteria facilities are sanitary and neat.	7.7%	69.2%	15.4%	2.6%	5.1%	0.0%

I. TRANSPORTATION

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
49. My child regularly rides the bus.	2.6%	5.1%	17.9%	7.7%	66.7%	0.0%
50. The bus driver maintains discipline on the bus.	2.6%	12.8%	71.8%	7.7%	5.1%	0.0%
51. The length of the student's bus ride is reasonable.	2.6%	15.4%	74.4%	5.1%	2.6%	0.0%

I. TRANSPORTATION (CONTINUED)

STATEMENT	STRONGLY AGREE	AGREE	CATEGORY NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
52. The drop-off zone at the school is safe.	7.7%	38.5%	46.2%	2.6%	5.1%	0.0%
53. The bus stop near my house is safe.	5.1%	17.9%	71.8%	2.6%	2.6%	0.0%
54. The bus stop is within walking distance from our home.	5.1%	28.2%	59.0%	2.6%	5.1%	0.0%
55. Buses arrive and depart on time.	2.6%	23.1%	69.2%	5.1%	0.0%	0.0%
56. Buses arrive early enough for students to eat breakfast at school.	2.6%	25.6%	66.7%	5.1%	0.0%	0.0%
57. Buses seldom break down.	5.1%	10.3%	74.4%	5.1%	5.1%	0.0%
58. Buses are clean.	2.6%	17.9%	76.9%	2.6%	0.0%	0.0%
59. Bus drivers allow students to sit down before taking off.	7.7%	12.8%	79.5%	0.0%	0.0%	0.0%
60. The district has a simple method to request buses for special events.	5.1%	17.9%	69.2%	2.6%	5.1%	0.0%

J. SAFETY AND SECURITY

STATEMENT	STRONGLY AGREE	AGREE	CATEGORY NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
61. Students feel safe and secure at school.	7.7%	48.7%	20.5%	17.9%	5.1%	0.0%
62. School disturbances are infrequent.	7.7%	41.0%	17.9%	28.2%	5.1%	0.0%
63. Gangs are not a problem in this district.	5.1%	33.3%	17.9%	23.1%	20.5%	0.0%
64. Drugs are not a problem in this district.	2.6%	25.6%	17.9%	30.8%	23.1%	0.0%
65. Vandalism is not a problem in this district.	2.6%	33.3%	10.3%	25.6%	28.2%	0.0%
66. Security personnel have a good working relationship with principals and teachers.	5.1%	53.8%	23.1%	7.7%	10.3%	0.0%
67. Security personnel are respected and liked by the students they serve.	2.6%	48.7%	28.2%	15.4%	5.1%	0.0%
68. A good working arrangement exists between the local law enforcement and the district.	5.1%	48.7%	35.9%	7.7%	2.6%	0.0%
69. Students receive fair and equitable discipline for misconduct.	5.1%	51.3%	17.9%	10.3%	15.4%	0.0%
70. Safety hazards do not exist on school grounds.	5.1%	38.5%	23.1%	20.5%	12.8%	0.0%

K. COMPUTERS AND TECHNOLOGY

STATEMENT	STRONGLY AGREE	AGREE	CATEGORY NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
71. Teachers know how to teach computer science and other technology-related courses.	10.3%	56.4%	28.2%	5.1%	0.0%	0.0%
72. Computers are new enough to be useful to teach students.	12.8%	51.3%	15.4%	10.3%	5.1%	5.1%
73. The district meets student needs in computer fundamentals.	10.3%	59.0%	15.4%	10.3%	5.1%	0.0%

K. COMPUTERS AND TECHNOLOGY (CONTINUED)

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
74. The district meets student needs in advanced computer skills.	10.3%	48.7%	20.5%	17.9%	2.6%	0.0%
75. Students have easy access to the Internet.	12.8%	43.6%	25.6%	15.4%	2.6%	0.0%

APPENDIX D
DISTRICT ADMINISTRATOR AND
SUPPORT STAFF SURVEY RESULTS
N =282

PART A: DEMOGRAPHIC DATA
Note: Percentages may not equal 100 due to rounding.

STATEMENT	CATEGORY		
	NO RESPONSE	MALE	FEMALE
1. Gender (Optional)	6.0%	18.4%	75.5%

STATEMENT	CATEGORY				
	NO RESPONSE	ANGLO	AFRICAN-AMERICAN	HISPANIC	ASIAN	OTHER
2. Ethnicity (Optional)	9.6%	12.8%	0.7%	73.4%	0.7%	2.8%

STATEMENT	CATEGORY					
	NO RESPONSE	1–5 YEARS	6–10 YEARS	11–15 YEARS	16–20 YEARS	20 + YEARS
3. How long have you been employed by South San Antonio ISD?	4.6%	18.1%	18.4%	17.0%	12.4%	29.4%

STATEMENT	CATEGORY			
	NO RESPONSE	ADMINISTRATOR	CLERICAL STAFFER	SUPPORT STAFFER
4. Are you a(n):	16.7%	12.4%	29.1%	41.8%

STATEMENT	CATEGORY					
	NO RESPONSE	1–5 YEARS	6–10 YEARS	11–15 YEARS	16–20 YEARS	20 + YEARS
5. How long have you been employed in this capacity by South San Antonio ISD?	8.2%	23.4%	20.9%	16.0%	11.7%	19.9%

PART B: SURVEY QUESTIONS
A. DISTRICT ORGANIZATION AND MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
1. The school board allows sufficient time for public input at meetings.	5.7%	26.2%	39.0%	18.4%	8.2%	2.5%
2. School board members listen to the opinions and desires of others.	4.6%	29.1%	33.7%	18.1%	12.4%	2.1%
3. The superintendent is a respected and effective instructional leader.	23.8%	38.7%	23.4%	7.8%	3.9%	2.5%
4. The superintendent is a respected and effective business manager.	20.9%	39.0%	28.7%	6.0%	2.5%	2.8%
5. Central administration is efficient.	10.3%	43.6%	20.9%	15.2%	8.9%	1.1%
6. Central administration supports the educational process.	16.0%	42.2%	20.2%	12.8%	6.7%	2.1%
7. The morale of central administration staff is good.	8.9%	36.5%	34.0%	13.8%	6.0%	0.7%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
8. Education is the main priority in our school district.	25.5%	35.8%	13.8%	16.0%	6.4%	2.5%
9. Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	12.1%	43.6%	23.8%	14.5%	3.9%	2.1%
10. The needs of the college-bound student are being met.	8.9%	35.8%	36.2%	14.2%	3.2%	1.8%
11. The needs of the work-bound student are being met.	8.2%	40.8%	34.0%	11.7%	2.8%	2.5%
12. The district has effective educational programs for the following:						
a. Reading	17.4%	54.3%	17.0%	8.5%	1.4%	1.4%
b. Writing	13.1%	52.1%	20.6%	11.0%	1.8%	1.4%
c. Mathematics	14.5%	54.6%	18.8%	9.2%	1.4%	1.4%
d. Science	12.1%	55.0%	20.6%	8.9%	1.8%	1.8%
e. English or Language Arts	14.5%	54.6%	19.9%	7.4%	1.8%	1.8%
f. Computer Instruction	15.2%	52.1%	21.3%	7.1%	2.1%	2.1%
g. Social Studies (history or geography)	13.1%	53.5%	21.3%	8.2%	1.4%	2.5%
h. Fine Arts	11.3%	43.6%	28.4%	10.3%	4.3%	2.1%
i. Physical Education	14.5%	50.0%	24.1%	6.4%	1.8%	3.2%
j. Business Education	2.6%	38.5%	41.0%	7.7%	5.1%	5.1%
k. Vocational (Career and Technology) Education	16.7%	43.3%	28.7%	5.7%	2.8%	2.8%
l. Foreign Language	9.9%	39.7%	32.6%	11.7%	3.9%	2.1%
13. The district has effective special programs for the following:						
a. Library Service	14.2%	55.0%	19.9%	6.4%	1.8%	2.8%
b. Honors/Gifted and Talented Education	16.0%	49.6%	19.9%	9.6%	1.8%	2.8%
c. Special Education	16.7%	54.6%	18.4%	4.6%	3.5%	2.1%
d. Head Start and Even Start programs	6.7%	42.2%	41.5%	6.0%	1.8%	1.8%
e. Dyslexia program	7.4%	41.1%	33.7%	11.0%	4.3%	2.5%
f. Student mentoring program	7.8%	41.1%	30.5%	13.8%	4.3%	2.5%
g. Advanced placement program	7.4%	36.5%	41.8%	8.9%	3.2%	2.1%
h. Literacy program	7.4%	39.0%	40.1%	8.5%	2.1%	2.8%
i. Programs for students at risk of dropping out of school	11.7%	43.6%	26.2%	11.3%	4.6%	2.5%
j. Summer school programs	16.7%	57.4%	15.2%	6.7%	1.4%	2.5%
k. Alternative education programs	10.3%	46.5%	26.6%	7.4%	6.4%	2.8%
l. "English as a second language" program	8.5%	56.4%	23.8%	7.1%	1.4%	2.8%
m. Career counseling program	8.9%	43.6%	33.7%	8.9%	1.8%	3.2%
n. College counseling program	8.9%	40.4%	36.2%	7.1%	3.9%	3.5%
o. Counseling the parents of students	7.8%	36.5%	31.2%	14.5%	7.1%	2.8%
p. Drop out prevention program	8.2%	36.2%	36.2%	11.0%	5.7%	2.5%
14. Parents are immediately notified if a child is absent from school.	14.2%	40.1%	23.4%	14.2%	5.0%	3.2%
15. Teacher turnover is low.	7.8%	35.8%	34.4%	14.9%	3.5%	3.5%
16. Highly qualified teachers fill job openings.	9.6%	31.6%	33.0%	14.5%	8.5%	2.8%
17. Teacher openings are filled quickly.	7.4%	31.6%	32.3%	20.6%	5.3%	2.8%
18. Teachers are rewarded for superior performance .	5.0%	24.5%	33.0%	22.3%	11.3%	3.9%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT (CONTINUED)

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
19. Teachers are counseled about less than satisfactory performance.	7.1%	30.1%	40.1%	13.1%	6.7%	2.8%
20. All schools have equal access to educational materials such as computers, science labs, and art classes.	11.0%	42.2%	20.2%	15.2%	8.5%	2.8%
21. The student-teacher ratio is reasonable.	8.2%	36.9%	23.4%	21.3%	7.1%	3.2%
22. Students have access, when needed, to a school nurse.	24.5%	54.6%	10.3%	7.4%	0.7%	2.5%
23. Classrooms are seldom left unattended.	12.8%	35.5%	25.5%	16.7%	6.4%	3.2%

C. PERSONNEL MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
24. District salaries are competitive with similar positions in the job market.	7.1%	30.1%	40.1%	13.1%	6.7%	2.8%
25. The district has a good and timely program for orienting new employees.	11.0%	42.2%	20.2%	15.2%	8.5%	2.8%
26. Temporary workers are rarely used.	2.1%	19.9%	37.2%	27.3%	12.1%	1.4%
27. The district successfully projects future staffing needs.	4.3%	26.2%	31.9%	21.3%	14.9%	1.4%
28. The district has an effective employee recruitment program.	3.9%	28.0%	40.8%	14.5%	11.3%	1.4%
29. The district operates an effective staff development program.	7.8%	30.9%	30.5%	17.4%	11.0%	2.5%
30. District employees receive annual personnel evaluations.	21.3%	61.3%	11.7%	1.4%	2.5%	1.8%
31. The district rewards competence and experience and spells out qualifications such as seniority and skill level needed for promotion	3.5%	16.0%	33.3%	26.6%	19.1%	1.4%
32. Employees who perform below the standard of expectation are counseled appropriately and timely.	6.4%	22.7%	31.9%	20.2%	16.7%	2.1%
33. The district has a fair and timely grievance process.	5.0%	25.9%	36.9%	16.0%	15.6%	0.7%
34. The district's health insurance package meets my needs.	6.0%	28.0%	13.8%	23.4%	27.3%	1.4%

D. COMMUNITY INVOLVEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
35. The district regularly communicates with parents.	13.5%	41.1%	24.8%	14.5%	5.0%	1.1%
36. The local television and radio stations regularly report school news and menus.	5.3%	22.3%	31.2%	31.2%	8.5%	1.4%
37. Schools have plenty of volunteers to help student and school programs.	3.2%	20.9%	27.7%	32.3%	13.8%	2.1%
38. District facilities are open for community use.	5.3%	40.4%	31.9%	14.2%	7.1%	1.1%

E. FACILITIES USE AND MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
39. Parents, citizens, students, faculty, staff, and the board provide input into facility planning.	7.8%	27.0%	31.9%	21.3%	10.3%	1.8%
40. The architect and construction managers are selected objectively and impersonally.	4.3%	13.8%	40.4%	19.9%	20.6%	1.1%
41. Schools are clean.	6.4%	33.3%	14.5%	25.5%	18.8%	1.4%
42. Buildings are properly maintained in a timely manner.	2.8%	24.8%	16.0%	31.6%	23.0%	1.8%
43. Repairs are made in a timely manner.	2.5%	21.3%	12.8%	34.8%	27.7%	1.1%
44. Emergency maintenance is handled properly.	7.4%	29.8%	14.5%	25.5%	19.9%	2.8%

F. FINANCIAL MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
45. Site-based budgeting is used effectively to extend the involvement of principals and teachers.	8.5%	31.2%	39.0%	12.8%	6.0%	2.5%
46. Campus administrators are well trained in fiscal management techniques.	8.2%	29.4%	39.0%	15.6%	6.0%	1.8%
47. The district's financial reports are easy to understand and read.	5.7%	23.0%	42.9%	17.7%	9.6%	1.1%
48. Financial reports are made available to community members when asked.	5.7%	20.6%	52.1%	13.8%	6.0%	1.8%

G. PURCHASING AND WAREHOUSING

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
49. Purchasing gets me what I need when I need it.	5.3%	30.1%	29.8%	21.3%	12.1%	1.4%
50. Purchasing acquires the highest quality materials and equipment at the lowest cost.	3.5%	28.4%	41.8%	16.3%	8.9%	1.1%
51. Purchasing processes are not cumbersome for the requestor.	5.3%	22.3%	45.7%	14.9%	9.6%	2.1%

G. PURCHASING AND WAREHOUSING (CONTINUED)

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
52. The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	7.1%	30.1%	37.2%	14.2%	9.9%	1.4%
53. Students are issued textbooks in a timely manner.	13.8%	45.4%	29.8%	5.3%	3.9%	1.8%
54. Textbooks are in good shape.	11.0%	45.7%	34.0%	5.0%	3.2%	1.1%
55. The school library meets students' needs for books and other resources for students.	18.4%	44.7%	24.1%	8.2%	2.5%	2.1%

H. SAFETY AND SECURITY

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
56. Gangs are not a problem in this district.	4.6%	11.3%	25.9%	36.2%	19.9%	2.1%
57. Drugs are not a problem in this district.	2.8%	9.9%	24.8%	36.9%	24.5%	1.1%
58. Vandalism is not a problem in this district.	1.4%	10.3%	18.4%	41.5%	27.0%	1.4%
59. Security personnel have a good working relationship with principals and teachers.	7.1%	37.6%	31.2%	12.4%	10.3%	1.4%
60. Security personnel are respected and liked by the students they serve.	6.0%	28.7%	39.0%	16.0%	9.6%	0.7%
61. A good working arrangement exists between the local law enforcement and the district.	9.2%	37.6%	36.9%	8.2%	5.0%	3.2%
62. Students receive fair and equitable discipline for misconduct.	8.2%	33.7%	24.5%	17.7%	14.9%	1.1%

I. COMPUTERS AND TECHNOLOGY

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO REPONSE
63. Students regularly use computers.	23.4%	45.7%	18.4%	7.4%	3.9%	1.1%
64. Students have regular access to computer equipment and software in the classroom.	18.4%	46.1%	19.1%	9.9%	5.0%	1.4%
65. Teachers know how to use computers in the classroom.	14.2%	50.7%	21.3%	9.2%	3.2%	1.4%
66. Computers are new enough to be useful for student instruction.	15.6%	44.0%	21.3%	10.3%	6.4%	2.5%
67. The district meets students' needs in computer fundamentals.	13.8%	44.0%	26.2%	9.9%	5.0%	1.1%
68. The district meets students' needs in advanced computer skills.	12.4%	31.2%	32.3%	16.0%	6.0%	2.1%
69. Teachers and students have easy access to the Internet.	16.7%	46.5%	22.7%	9.9%	3.2%	1.1%

APPENDIX E

PRINICIPAL AND ASSISTANT PRINICIPAL SURVEY RESULTS

N = 26

Percentages may not equal 100 due to rounding and multiple responses.

PART A: DEMOGRAPHIC DATA

	CATEGORY		
STATEMENT	NO RESPONSE	MALE	FEMALE
1. Gender (Optional)	7.7%	50.0%	42.3%

	CATEGORY					
STATEMENT	NO RESPONSE	ANGLO	AFRICAN-AMERICAN	HISPANIC	ASIAN	OTHER
2. Ethnicity (Optional)	11.5%	15.4%	0.0%	69.2%	0.0%	3.8%

	CATEGORY					
STATEMENT	NO RESPONSE	1-5 YEARS	6-10 YEARS	11-15 YEARS	16-20 YEARS	20+ YEARS
3. How long have you been employed by South San Antonio ISD?	0.0%	15.4%	15.4%	15.4%	3.8%	50.0%

STATEMENT	CATEGORY			
	GRADE LEVEL		GRADE LEVEL	
4. What grades are taught in your school?	Pre-Kindergarten	38.5%	Sixth Grade	34.6%
	Kindergarten	38.5%	Seventh Grade	34.6%
	First Grade	38.5%	Eighth Grade	34.6%
	Second Grade	42.3%	Ninth Grade	23.1%
	Third Grade	46.2%	Tenth Grade	23.1%
	Fourth Grade	46.2%	Eleventh Grade	23.1%
	Fifth Grade	42.3%	Twelfth Grade	23.1%

PART B: SURVEY QUESTIONS
A. DISTRICT ORGANIZATION AND MANAGEMENT

	CATEGORY					
STATEMENT	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
1. The school board allows sufficient time for public input at meetings.	11.5%	34.6%	42.3%	7.7%	0.0%	3.8%
2. School board members listen to the opinions and desires of others.	3.8%	42.3%	15.4%	26.9%	7.7%	3.8%
3. School board members understand their role as policymakers and stay out of the day-to-day management of the district.	0.0%	19.2%	30.8%	19.2%	26.9%	3.8%
4. The superintendent is a respected and effective instructional leader.	46.2%	42.3%	3.8%	0.0%	3.8%	3.8%
5. The superintendent is a respected and effective business manager.	42.3%	46.2%	7.7%	0.0%	0.0%	3.8%
6. Central administration is efficient.	19.2%	57.7%	15.4%	0.0%	3.8%	3.8%
7. Central administration supports the educational process.	19.2%	61.5%	11.5%	0.0%	3.8%	3.8%
8. The morale of central administration staff is good.	15.4%	23.1%	46.2%	7.7%	0.0%	7.7%
9. Education is the main priority in our school district.	26.9%	61.5%	7.7%	0.0%	3.8%	0.0%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

STATEMENT	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
10. Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	26.9%	50.0%	11.5%	3.8%	7.7%	0.0%
11. The needs of the college-bound student are being met.	11.5%	42.3%	34.6%	11.5%	0.0%	0.0%
12. The needs of the work-bound student are being met.	11.5%	50.0%	34.6%	3.8%	0.0%	0.0%
13. The district provides curriculum guides for all grades and subjects.	23.1%	65.4%	3.8%	7.7%	0.0%	0.0%
14. The curriculum guides are appropriately aligned and coordinated.	30.8%	57.7%	3.8%	7.7%	0.0%	0.0%
15. The district's curriculum guides clearly outline what to teach and how to teach it.	23.1%	61.5%	3.8%	11.5%	0.0%	0.0%
16. The district has effective educational programs for the following:						
a. Reading	30.8%	69.2%	0.0%	0.0%	0.0%	0.0%
b. Writing	19.2%	69.2%	0.0%	11.5%	0.0%	0.0%
c. Mathematics	19.2%	53.8%	3.8%	19.2%	3.8%	0.0%
d. Science	23.1%	57.7%	0.0%	19.2%	0.0%	0.0%
e. English or Language Arts	23.1%	73.1%	0.0%	3.8%	0.0%	0.0%
f. Computer Instruction	11.5%	69.2%	0.0%	19.2%	0.0%	0.0%
g. Social Studies history or geography)	19.2%	69.2%	0.0%	11.5%	0.0%	0.0%
h. Fine Arts	11.5%	42.3%	3.8%	38.5%	3.8%	0.0%
i. Physical Education	30.8%	61.5%	3.8%	3.8%	0.0%	0.0%
j. Business Education	3.8%	34.6%	57.7%	0.0%	0.0%	3.8%
j. Vocational (Career and Technology) Education	11.5%	53.8%	30.8%	0.0%	0.0%	3.8%
k. Foreign Language	7.7%	53.8%	30.8%	3.8%	0.0%	3.8%
17. The district has effective special programs for the following:						
a. Library Service	19.2%	61.5%	7.7%	7.7%	3.8%	0.0%
b. Honors/Gifted and Talented Education	15.4%	50.0%	3.8%	26.9%	3.8%	0.0%
c. Special Education	26.9%	46.2%	7.7%	15.4%	0.0%	3.8%
d. Head Start and Even Start programs	7.7%	38.5%	50.0%	3.8%	0.0%	0.0%
e. Dyslexia program	7.7%	30.8%	26.9%	26.9%	7.7%	0.0%
f. Student mentoring program	3.8%	50.0%	26.9%	19.2%	0.0%	0.0%
g. Advanced placement program	3.8%	50.0%	26.9%	19.2%	0.0%	0.0%
h. Literacy program	3.8%	53.8%	34.6%	7.7%	0.0%	0.0%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT (CONTINUED)

	CATEGORY					
STATEMENT	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
i. Programs for students at risk of dropping out of school	15.4%	50.0%	19.2%	15.4%	0.0%	0.0%
j. Summer school programs	23.1%	61.5%	11.5%	3.8%	0.0%	0.0%
k. Alternative education programs	15.4%	34.6%	26.9%	19.2%	0.0%	3.8%
l. "English as a second language" program	19.2%	53.8%	11.5%	11.5%	0.0%	3.8%
m. Career counseling program	11.5%	50.0%	26.9%	7.7%	0.0%	3.8%
n. College counseling program	11.5%	42.3%	26.9%	19.2%	0.0%	0.0%
o. Counseling the parents of students	7.7%	23.1%	30.8%	38.5%	0.0%	0.0%
p. Drop out prevention program	15.4%	34.6%	34.6%	15.4%	0.0%	0.0%
18. Parents are immediately notified if a child is absent from school.	11.5%	61.5%	3.8%	23.1%	0.0%	0.0%
19. Teacher turnover is low.	15.4%	57.7%	15.4%	3.8%	7.7%	0.0%
20. Highly qualified teachers fill job openings.	23.1%	46.2%	11.5%	15.4%	3.8%	0.0%
21. Teachers are rewarded for superior performance.	7.7%	26.9%	19.2%	42.3%	3.8%	0.0%

C. PERSONNEL MANAGEMENT

	CATEGORY					
STATEMENT	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
22. District salaries are competitive with similar positions in the job market.	0.0%	19.2%	0.0%	53.8%	26.9%	0.0%
23. The district has a good and timely program for orienting new employees.	15.4%	53.8%	7.7%	23.1%	0.0%	0.0%
24. Temporary workers are rarely used.	7.7%	30.8%	23.1%	30.8%	7.7%	0.0%
25. The district successfully projects future staffing needs.	7.7%	61.5%	15.4%	15.4%	0.0%	0.0%
26. The district has an effective employee recruitment program.	11.5%	46.2%	26.9%	15.4%	0.0%	0.0%
27. The district operates an effective staff development program.	15.4%	57.7%	3.8%	23.1%	0.0%	0.0%
28. District employees receive annual personnel evaluations.	34.6%	65.4%	0.0%	0.0%	0.0%	0.0%
29. The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	7.7%	7.7%	15.4%	61.5%	3.8%	3.8%
30. Employees who perform below the standard of expectation are counseled appropriately and timely.	11.5%	65.4%	11.5%	7.7%	0.0%	3.8%

C. PERSONNEL MANAGEMENT (CONTINUED)

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
31. The district has a fair and timely grievance process.	19.2%	46.2%	26.9%	3.8%	3.8%	0.0%
32. The district's health insurance package meets my needs.	11.5%	38.5%	7.7%	38.5%	3.8%	0.0%

D. COMMUNITY INVOLVEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
37. The district regularly communicates with parents.	23.1%	65.4%	3.8%	7.7%	0.0%	0.0%
38. Schools have plenty of volunteers to help student and school programs.	3.8%	26.9%	15.4%	50.0%	3.8%	0.0%
39. District facilities are open for community use.	7.7%	61.5%	19.2%	11.5%	0.0%	0.0%

E. FACILITIES USE AND MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
40. Parents, citizens, students, faculty, staff, and the board provide input into facility planning.	26.9%	42.3%	19.2%	11.5%	0.0%	0.0%
41. Schools are clean.	7.7%	50.0%	3.8%	38.5%	0.0%	0.0%
42. Buildings are properly maintained in a timely manner.	0.0%	42.3%	3.8%	42.3%	11.5%	0.0%
43. Repairs are made in a timely manner.	0.0%	26.9%	7.7%	53.8%	11.5%	0.0%
44. Emergency maintenance is handled promptly.	7.7%	46.2%	11.5%	34.6%	0.0%	0.0%

F. FINANCIAL MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
45. Site-based budgeting is used effectively to extend the involvement of principals and teachers.	15.4%	69.2%	7.7%	7.7%	0.0%	0.0%
46. Campus administrators are well trained in fiscal management techniques.	11.5%	46.2%	11.5%	30.8%	0.0%	0.0%
47. Financial resources are allocated fairly and equitably at my school.	23.1%	57.7%	11.5%	7.7%	0.0%	0.0%

G. PURCHASING AND WAREHOUSING

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
48. Purchasing gets me what I need when I need it.	7.7%	61.5%	11.5%	11.5%	3.8%	3.8%
49. Purchasing acquires high quality materials and equipment at the lowest cost.	3.8%	57.7%	30.8%	7.7%	0.0%	0.0%
50. Purchasing processes are not cumbersome for the requestor.	11.5%	42.3%	15.4%	23.1%	7.7%	0.0%

G. PURCHASING AND WAREHOUSING (CONTINUED)

	CATEGORY					
STATEMENT	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
51. The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	11.5%	57.7%	11.5%	19.2%	0.0%	0.0%
52. Students are issued textbooks in a timely manner.	23.1%	73.1%	3.8%	0.0%	0.0%	0.0%
53. Textbooks are in good shape.	26.9%	73.1%	0.0%	0.0%	0.0%	0.0%
54. The school library meets student needs for books and other resources.	26.9%	61.5%	3.8%	7.7%	0.0%	0.0%

H. FOOD SERVICES

	CATEGORY					
STATEMENT	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
55. The cafeteria's food looks and tastes good.	26.9%	46.2%	7.7%	19.2%	0.0%	0.0%
56. Food is served warm.	30.8%	61.5%	3.8%	3.8%	0.0%	0.0%
57. Students have enough time to eat.	34.6%	65.4%	0.0%	0.0%	0.0%	0.0%
58. Students eat lunch at the appropriate time of day.	34.6%	65.4%	0.0%	0.0%	0.0%	0.0%
59. Students wait in food lines no longer than 10 minutes.	34.6%	61.5%	3.8%	0.0%	0.0%	0.0%
60. Discipline and order are maintained in the school cafeteria.	34.6%	57.7%	0.0%	7.7%	0.0%	0.0%
61. Cafeteria staff is helpful and friendly.	38.5%	53.8%	3.8%	3.8%	0.0%	0.0%
62. Cafeteria facilities are sanitary and neat.	42.3%	53.8%	3.8%	0.0%	0.0%	0.0%

I. TRANSPORTATION

	CATEGORY					
STATEMENT	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
63. The drop-off zone at the school is safe.	30.8%	65.4%	0.0%	3.8%	0.0%	0.0%
64. The district has a simple method to request buses for special events.	23.1%	50.0%	7.7%	15.4%	3.8%	0.0%
65. Buses arrive and leave on time.	11.5%	73.1%	11.5%	3.8%	0.0%	0.0%
66. Adding or modifying a route for a student is easy to accomplish.	15.4%	30.8%	38.5%	11.5%	3.8%	0.0%

J. SAFETY AND SECURITY

	CATEGORY					
STATEMENT	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
67. Students feel safe and secure at school.	30.8%	69.2%	0.0%	0.0%	0.0%	0.0%
68. School disturbances are infrequent.	30.8%	61.5%	3.8%	3.8%	0.0%	0.0%
69. Gangs are not a problem in this district.	7.7%	19.2%	19.2%	42.3%	11.5%	0.0%
70. Drugs are not a problem in this district.	7.7%	19.2%	19.2%	42.3%	11.5%	0.0%
71. Vandalism is not a problem in this district.	0.0%	23.1%	15.4%	50.0%	7.7%	3.8%

J. SAFETY AND SECURITY (CONTINUED)

	CATEGORY					
STATEMENT	**STRONGLY AGREE**	**AGREE**	**NO OPINION**	**DISAGREE**	**STRONGLY DISAGREE**	**NO RESPONSE**
72. Security personnel have a good working relationship with principals and teachers.	11.5%	76.9%	3.8%	7.7%	0.0%	0.0%
73. Security personnel are respected and liked by the students they serve.	7.7%	76.9%	7.7%	7.7%	0.0%	0.0%
74. A good working arrangement exists between the local law enforcement and the district.	23.1%	61.5%	15.4%	0.0%	0.0%	0.0%
75. Students receive fair and equitable discipline for misconduct.	30.8%	69.2%	0.0%	0.0%	0.0%	0.0%
76. Safety hazards do not exist on school grounds.	11.5%	65.4%	7.7%	15.4%	0.0%	0.0%

K. COMPUTERS AND TECHNOLOGY

	CATEGORY					
STATEMENT	**STRONGLY AGREE**	**AGREE**	**NO OPINION**	**DISAGREE**	**STRONGLY DISAGREE**	**NO RESPONSE**
77. Students regularly use computers.	30.8%	57.7%	3.8%	7.7%	0.0%	0.0%
78. Students have regular access to computer equipment and software in the classroom.	30.8%	65.4%	0.0%	3.8%	0.0%	0.0%
79. Computers are new enough to be useful for student instruction.	23.1%	76.9%	0.0%	0.0%	0.0%	0.0%
80. The district meets student needs in computer fundamentals.	19.2%	65.4%	3.8%	11.5%	0.0%	0.0%
81. The district meets student needs in advanced computer skills.	15.4%	50.0%	19.2%	11.5%	3.8%	0.0%
82. Teachers know how to use computers in the classroom.	15.4%	73.1%	0.0%	11.5%	0.0%	0.0%
83. Teachers and students have easy access to the Internet.	23.1%	69.2%	3.8%	3.8%	0.0%	0.0%

APPENDIX F
TEACHER SURVEY RESULTS
N = 340

Note: Percentages may not equal 100 due to rounding and multiple responses.

PART A: DEMOGRAPHIC DATA

STATEMENT	CATEGORY		
	NO RESPONSE	MALE	FEMALE
1. Gender (Optional)	8.5%	20.6%	70.9%

STATEMENT	CATEGORY					
	NO RESPONSE	ANGLO	AFRICAN-AMERICAN	HISPANIC	ASIAN	OTHER
2. Ethnicity (Optional)	9.7%	35.3%	1.8%	50.6%	0.6%	2.1%

STATEMENT	CATEGORY					
	NO RESPONSE	1–5 YEARS	6–10 YEARS	11–15 YEARS	16–20 YEARS	20 + YEARS
3. How long have you been employed by South San Antonio ISD?	1.8%	23.8%	22.4%	17.1%	9.7%	25.3%

STATEMENT	CATEGORY			
	GRADE LEVEL		GRADE LEVEL	
4. What grade(s) do you teach this year?	Pre-Kindergarten	6.5%	Sixth Grade	17.4%
	Kindergarten	10.3%	Seventh Grade	19.7%
	First Grade	13.8%	Eighth Grade	19.7%
	Second Grade	10.3%	Ninth Grade	14.4%
	Third Grade	14.7%	Tenth Grade	15.9%
	Fourth Grade	10.0%	Eleventh Grade	16.2%
	Fifth Grade	11.2%	Twelfth Grade	16.5%

PART B: SURVEY QUESTIONS
A. DISTRICT ORGANIZATION AND MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
1. The school board allows sufficient time for public input at meetings.	3.5%	30.0%	46.8%	10.6%	4.4%	4.7%
2. School board members listen to the opinions and desires of others.	2.4%	26.2%	40.9%	18.5%	9.4%	2.6%
3. School board members work well with the superintendent.	2.1%	20.3%	47.6%	17.1%	9.1%	3.8%
4. The school board has a good image in the community.	1.5%	11.8%	23.5%	33.5%	27.1%	2.6%
5. The superintendent is a respected and effective instructional leader.	20.0%	54.1%	14.1%	6.5%	2.1%	3.2%
6. The superintendent is a respected and effective business manager.	18.2%	47.9%	22.9%	5.3%	2.6%	2.9%
7. Central administration is efficient.	5.3%	41.8%	18.5%	25.6%	6.2%	2.6%
8. Central administration supports the educational process.	8.2%	50.9%	16.8%	15.0%	6.2%	2.9%
9. The morale of central administration staff is good.	5.9%	35.6%	44.4%	7.1%	4.1%	2.9%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
10. Education is the main priority in our school district.	22.9%	44.1%	5.6%	18.2%	7.6%	1.5%
11. Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	12.1%	50.3%	9.4%	21.8%	5.3%	1.2%
12. The needs of the college-bound student are being met.	6.2%	33.8%	28.2%	23.5%	7.1%	1.2%
13. The needs of the work-bound student are being met.	6.8%	46.2%	28.2%	13.8%	3.2%	1.8%
14. The district provides curriculum guides for all grades and subjects.	22.1%	57.9%	6.5%	9.1%	3.2%	1.2%
15. The curriculum guides are appropriately aligned and coordinated.	17.6%	50.0%	8.8%	18.2%	4.4%	0.9%
16. The district's curriculum guides clearly outline what to teach and how to teach it.	15.9%	49.4%	10.0%	18.2%	5.3%	1.2%
17. The district has effective educational programs for the following:						
a. Reading	24.4%	55.6%	7.6%	10.3%	0.6%	1.5%
b. Writing	15.0%	56.2%	10.6%	16.8%	0.9%	0.6%
c. Mathematics	16.8%	56.2%	8.5%	15.9%	2.4%	0.3%
d. Science	12.6%	56.2%	14.7%	14.7%	1.2%	0.6%
e. English or Language Arts	16.5%	62.1%	9.7%	10.3%	0.9%	0.6%
f. Computer Instruction	12.1%	53.8%	11.5%	17.4%	4.1%	1.2%
g. Social Studies (history or geography)	12.4%	60.3%	13.5%	10.6%	1.8%	1.5%
h. Fine Arts	9.4%	42.6%	17.6%	16.5%	12.4%	1.5%
i. Physical Education	13.8%	53.2%	15.0%	10.9%	5.9%	1.2%
j. Business Education	7.4%	32.1%	50.0%	5.6%	2.1%	2.9%
k. Vocational (Career and Technology) Education	10.9%	32.4%	45.3%	6.8%	2.9%	1.8%
l. Foreign Language	7.9%	34.7%	42.6%	8.5%	4.1%	2.1%
18. The district has effective special programs for the following:						
a. Library Service	14.1%	55.0%	10.9%	17.4%	2.4%	0.3%
b. Honors/Gifted and Talented Education	10.3%	52.1%	13.8%	17.9%	5.6%	0.3%
c. Special Education	15.3%	61.2%	9.4%	10.9%	2.9%	0.3%
d. Head Start and Even Start programs	8.5%	30.6%	51.5%	5.0%	1.8%	2.6%
e. Dyslexia program	6.5%	36.8%	32.9%	15.9%	7.1%	0.9%
f. Student mentoring program	7.1%	39.7%	29.7%	17.4%	5.6%	0.6%
g. Advanced placement program	6.8%	35.6%	40.3%	12.4%	3.2%	1.8%
h. Literacy program	7.6%	41.2%	36.2%	7.9%	3.8%	3.2%
i. Programs for students at risk for dropping out of school	11.2%	40.3%	31.2%	12.6%	4.1%	0.6%
j. Summer school programs	17.1%	60.0%	12.9%	5.9%	2.6%	1.5%
k. Alternative education programs	9.4%	41.8%	31.8%	11.5%	4.7%	0.9%
l. "English as a Second Language" program	12.4%	54.1%	23.8%	7.6%	1.8%	0.3%
m. Career counseling program	6.8%	29.1%	51.2%	8.8%	2.6%	1.5%
n. College counseling program	5.6%	30.3%	51.5%	8.8%	2.9%	0.9%
o. Counseling the parents of students	6.2%	29.7%	36.5%	18.5%	8.2%	0.9%
p. Drop out prevention program	6.5%	33.5%	43.2%	11.5%	4.7%	0.6%
19. Parents are immediately notified if a child is absent from school.	15.3%	45.6%	16.2%	17.6%	3.2%	2.1%

B. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT (CONTINUED)

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
20. Teacher turnover is low.	9.7%	39.7%	19.4%	26.2%	4.4%	0.6%
21. Highly qualified teachers fill job openings.	11.5%	48.5%	14.4%	20.0%	4.4%	1.2%
22. Teacher openings are filled quickly.	8.5%	46.8%	15.0%	24.1%	4.1%	1.5%
23. Teachers are rewarded for superior performance.	2.6%	17.1%	15.9%	43.8%	19.4%	1.2%
24. Teachers are counseled about less-than-satisfactory performance.	6.8%	47.1%	25.9%	14.7%	4.4%	1.2%
25. Teachers are knowledgeable in the subject areas they teach.	21.2%	63.8%	6.5%	6.8%	0.9%	0.9%
26. All schools have equal access to educational materials such as computers, television monitors, science labs, and art classes.	11.8%	41.8%	8.2%	25.3%	11.8%	1.2%
27. The students-to-teacher ratio is reasonable.	11.5%	52.1%	5.0%	21.2%	9.4%	0.9%
28. Classrooms are seldom left unattended.	22.6%	57.4%	3.8%	10.9%	4.7%	0.6%

C. PERSONNEL MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
29. District salaries are competitive with similar positions in the job market.	6.8%	39.7%	7.1%	29.1%	16.8%	0.6%
30. The district has a good and timely program for orienting new employees.	7.1%	52.4%	22.9%	13.2%	3.8%	0.6%
31. Temporary workers are rarely used.	3.2%	31.8%	31.2%	25.0%	7.4%	1.5%
32. The district successfully projects future staffing needs.	4.1%	32.9%	33.5%	20.9%	7.4%	1.2%
33. The district has an effective employee recruitment program.	4.7%	32.9%	40.6%	15.3%	5.3%	1.2%
34. The district operates an effective staff development program.	7.4%	44.7%	15.6%	23.5%	7.4%	1.5%
35. District employees receive annual personnel evaluations.	22.6%	67.6%	5.6%	2.6%	0.9%	0.6%
36. The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	3.8%	23.2%	25.0%	32.6%	14.7%	0.6%
37. Employees who perform below the standard of expectation are counseled appropriately and timely.	7.1%	37.1%	30.6%	19.1%	5.6%	0.6%
38. The district has a fair and timely grievance process.	5.9%	35.9%	37.4%	10.0%	8.5%	2.4%
39. The district's health insurance package meets my needs.	4.1%	30.0%	10.3%	27.4%	27.6%	0.6%

D. COMMUNITY INVOLVEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
40. The district regularly communicates with parents.	11.5%	56.2%	14.1%	13.8%	4.1%	0.3%
41. The local television and radio stations regularly report school news and menus.	4.1%	32.6%	25.9%	28.5%	8.5%	0.3%
42. Schools have plenty of volunteers to help student and school programs.	3.2%	22.1%	17.9%	40.6%	15.9%	0.3%
43. District facilities are open for community use.	6.8%	45.3%	31.5%	11.5%	3.8%	1.2%

E. FACILITIES USE AND MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
44. The district plans facilities far enough in the future to support enrollment growth.	3.8%	37.6%	31.5%	20.6%	5.6%	0.9%
45. Parents, citizens, students, faculty, staff, and the board provide input into facility planning.	4.7%	43.5%	23.2%	18.8%	8.5%	1.2%
46 The architect and construction managers are selected objectively and impersonally.	2.1%	11.2%	35.3%	25.3%	25.6%	0.6%
47. The quality of new construction is excellent.	2.6%	13.8%	20.6%	33.2%	29.1%	0.6%
48. Schools are clean.	5.9%	34.4%	7.9%	31.2%	20.3%	0.3%
49. Buildings are properly maintained in a timely manner.	3.8%	25.0%	7.9%	34.1%	28.5%	0.6%
50. Repairs are made in a timely manner.	2.1%	20.6%	7.9%	36.8%	32.1%	0.6%
51. Emergency maintenance is handled promptly.	4.4%	35.3%	17.1%	27.1%	15.9%	0.3%

F. FINANCIAL MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
52. Site-based budgeting is used effectively to extend the involvement of principals and teachers.	12.9%	41.8%	19.7%	18.5%	6.2%	0.9%
53. Campus administrators are well trained in fiscal management techniques.	11.2%	39.7%	31.8%	11.8%	4.4%	1.2%
54. Financial reports are allocated fairly and equitably at my school.	10.6%	43.8%	17.9%	16.8%	9.7%	1.2%

G. PURCHASING AND WAREHOUSING

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
55. Purchasing gets me what I need when I need it.	5.0%	35.6%	20.0%	28.8%	8.5%	2.1%
56. Purchasing acquires the highest quality materials and equipment at the lowest cost.	3.8%	27.6%	37.9%	21.2%	6.8%	2.6%
57. Purchasing processes are not cumbersome for the requestor.	3.2%	27.9%	31.2%	25.3%	8.5%	3.8%
58. Vendors are selected competitively.	3.2%	25.0%	47.1%	14.7%	7.1%	2.9%

G. PURCHASING AND WAREHOUSING (CONTINUED)

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
59. The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	3.8%	33.5%	22.9%	29.1%	8.5%	2.1%
60. Students are issued textbooks in a timely manner.	14.7%	62.6%	11.5%	6.2%	2.6%	2.4%
61. Textbooks are in good shape.	12.6%	63.2%	12.1%	7.6%	2.4%	2.1%
62. The school library meets students' needs for books and other resources.	15.3%	55.0%	8.5%	13.5%	4.7%	2.9%

H. FOOD SERVICES

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
63. The cafeteria's food looks and tastes good.	6.5%	43.5%	14.4%	23.8%	9.1%	2.6%
64. Food is served warm.	9.7%	61.5%	10.9%	10.0%	5.3%	2.6%
65. Students eat lunch at the appropriate time of day.	13.8%	72.1%	3.8%	5.9%	2.1%	2.4%
66. Students wait in food lines no longer than 10 minutes.	15.0%	58.8%	11.2%	8.8%	3.8%	2.4%
67. Discipline and order are maintained in the school cafeteria.	10.3%	58.5%	8.8%	12.9%	7.1%	2.4%
68. Cafeteria staff is helpful and friendly.	23.8%	51.2%	8.8%	7.9%	5.6%	2.6%
69. Cafeteria facilities are sanitary and neat.	24.1%	58.5%	7.6%	5.0%	2.4%	2.4%

I. SAFETY AND SECURITY

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
70. School disturbances are infrequent.	9.1%	45.6%	7.1%	23.2%	12.6%	2.4%
71. Gangs are not a problem in this district.	2.9%	17.4%	23.5%	35.0%	19.1%	2.1%
72. Drugs are not a problem in this district.	2.4%	12.6%	24.4%	37.1%	21.5%	2.1%
73. Vandalism is not a problem in this district.	2.4%	10.6%	15.0%	40.9%	29.1%	2.1%
74. Security personnel have a good working relationship with principals and teachers.	10.9%	44.1%	26.5%	11.5%	4.7%	2.4%
75. Security personnel are respected and liked by the students they serve.	9.1%	33.2%	41.5%	10.0%	4.1%	2.1%
76. A good working arrangement exists between the local law enforcement and the district.	10.3%	45.3%	34.7%	5.6%	2.4%	1.8%
77. Students receive fair and equitable discipline for misconduct.	8.8%	38.8%	12.4%	21.5%	16.5%	2.1%
78. Safety hazards do not exist on school grounds.	5.3%	34.4%	15.3%	29.1%	14.4%	1.5%

J. COMPUTERS AND TECHNOLOGY

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
79. Students regularly use computers.	19.1%	61.2%	3.8%	12.6%	2.6%	0.6%
80. Students have regular access to computer equipment and software in the classroom.	17.4%	54.1%	5.0%	18.2%	4.7%	0.6%
81. Teachers know how to use computers in the classroom.	14.1%	66.2%	6.5%	10.3%	2.4%	0.6%
82. Computers are new enough to be useful for student instruction.	10.3%	55.0%	5.6%	19.1%	9.4%	0.6%
83. The district meets students' needs in computer fundamentals.	12.4%	50.9%	11.5%	17.6%	6.8%	0.9%
84. The district meets students' needs in advanced computer skills.	9.1%	30.6%	31.2%	20.6%	7.4%	1.2%
85. Teachers and students have easy access to the Internet.	18.2%	61.8%	5.3%	9.1%	4.4%	1.2%

APPENDIX G
STUDENT SURVEY RESULTS
N = 137

PART A: DEMOGRAPHIC DATA

	CATEGORY		
STATEMENT	NO RESPONSE	MALE	FEMALE
1. Gender (Optional)	5.8%	43.1%	51.1%

	CATEGORY					
STATEMENT	NO RESPONSE	ANGLO	AFRICAN-AMERICAN	HISPANIC	ASIAN	OTHER
2. Ethnicity (Optional)	8.0%	5.1%	0.7%	84.7%	0.0%	1.5%

	CATEGORY		
STATEMENT	NO RESPONSE	JUNIOR	SENIOR
3. What is your classification?	2.2%	40.1%	57.7%

PART B: SURVEY QUESTIONS
A. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT

	CATEGORY					
STATEMENT	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
1. The needs of the college-bound student are being met.	2.2%	48.2%	33.6%	11.7%	2.9%	1.5%
2. The needs of the work-bound student are being met.	5.1%	46.7%	38.0%	6.6%	1.5%	2.2%
3. The district has effective educational programs for the following:						
a. Reading	10.9%	59.1%	19.0%	7.3%	2.9%	0.7%
b. Writing	14.6%	57.7%	17.5%	6.6%	2.9%	0.7%
c. Mathematics	13.9%	48.9%	19.0%	8.8%	8.8%	0.7%
d. Science	8.8%	54.0%	20.4%	10.9%	5.1%	0.7%
e. English or Language Arts	19.0%	58.4%	16.8%	2.9%	1.5%	1.5%
f. Computer Instruction	13.1%	48.9%	21.9%	11.7%	2.9%	1.5%
g. Social Studies (history or geography)	20.4%	59.9%	15.3%	1.5%	2.2%	0.7%
h. Fine Arts	16.8%	53.3%	22.6%	2.2%	3.6%	1.5%
i. Physical Education	14.6%	49.6%	25.5%	5.1%	3.6%	1.5%
j. Business Education	13.9%	46.7%	29.9%	6.6%	2.2%	0.7%
k. Vocational (Career and Technology) Education	26.3%	41.6%	27.7%	4.4%	0.0%	0.0%
l. Foreign Language	10.9%	55.5%	16.8%	9.5%	5.1%	2.2%
4. The district has effective special programs for the following:						
a. Library Service	10.9%	48.9%	26.3%	8.0%	4.4%	1.5%
b. Honors/Gifted and Talented Education	16.1%	50.4%	24.1%	4.4%	3.6%	1.5%
c. Special Education	12.4%	47.4%	34.3%	1.5%	2.2%	2.2%
d. Student mentoring program	7.3%	30.7%	43.8%	10.9%	5.8%	1.5%
e. Advanced placement program	11.7%	54.0%	25.5%	4.4%	2.2%	2.2%
f. Career counseling program	10.9%	44.5%	28.5%	12.4%	1.5%	2.2%
g. College counseling program	14.6%	45.3%	24.8%	13.1%	1.5%	0.7%
5. Students have access, when needed, to a school nurse.	25.5%	52.6%	9.5%	7.3%	4.4%	0.7%

A. EDUCATIONAL SERVICE DELIVERY AND PERFORMANCE MEASUREMENT
   (CONTINUED)

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
6. Classrooms are seldom left unattended.	10.2%	33.6%	29.2%	16.8%	9.5%	0.7%
7. The district provides a high quality education.	6.6%	37.2%	29.2%	19.0%	6.6%	1.5%
8. The district has high quality teachers.	7.3%	36.5%	35.0%	12.4%	8.0%	0.7%

B. FACILITIES USE AND MANAGEMENT

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
9. Schools are clean.	4.4%	19.7%	27.0%	26.3%	21.9%	0.7%
10. Buildings are properly maintained in a timely manner.	3.6%	32.8%	22.6%	22.6%	16.8%	1.5%
11. Repairs are made in a timely manner.	3.6%	15.3%	24.8%	27.7%	27.7%	0.7%
12. Emergency maintenance is handled timely.	5.8%	32.1%	32.8%	15.3%	13.1%	0.7%

C. PURCHASING AND WAREHOUSING

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
13. There are enough textbooks in all my classes.	8.8%	44.5%	10.9%	26.3%	8.8%	0.7%
14. Students are issued textbooks in a timely manner.	10.2%	59.9%	16.8%	11.7%	0.7%	0.7%
15. Textbooks are in good shape.	7.3%	33.6%	18.2%	27.0%	12.4%	1.5%
16. The school library meets student needs for books and other resources.	12.4%	47.4%	17.5%	13.9%	8.0%	0.7%

D. FOOD SERVICES

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
17. The school breakfast program is available to all children.	27.0%	54.7%	8.0%	4.4%	5.1%	0.7%
18. The cafeteria's food looks and tastes good.	0.7%	17.5%	29.2%	21.2%	30.7%	0.7%
19. Food is served warm.	1.5%	32.1%	24.1%	28.5%	12.4%	1.5%
20. Students have enough time to eat.	4.4%	32.8%	13.1%	26.3%	21.9%	1.5%
21. Students eat lunch at the appropriate times of the day.	14.6%	52.6%	16.8%	10.2%	4.4%	1.5%
22. Students wait in food lines no longer than 10 minutes.	6.6%	26.3%	16.1%	30.7%	19.7%	0.7%
23. Discipline and order are maintained in the school cafeteria.	5.8%	40.9%	21.9%	19.0%	11.7%	0.7%
24. Cafeteria staff is helpful and friendly.	10.9%	34.3%	21.9%	19.7%	11.7%	1.5%
25. Cafeteria facilities are sanitary and neat.	10.2%	30.7%	33.6%	13.9%	9.5%	2.2%

E. TRANSPORTATION

	CATEGORY					
STATEMENT	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
26. I regularly ride the bus.	3.6%	10.2%	32.8%	17.5%	31.4%	4.4%
27. The bus driver maintains discipline on the bus.	5.1%	8.0%	72.3%	5.1%	6.6%	2.9%
28. The length of my bus ride is reasonable.	3.6%	11.7%	74.5%	3.6%	3.6%	2.9%
29. The drop-off zone at the school is safe.	2.2%	16.8%	70.8%	2.2%	3.6%	4.4%
30. The bus stop near my house is safe.	2.2%	12.4%	73.7%	3.6%	4.4%	3.6%
31. The bus stop is within walking distance from our home.	2.9%	15.3%	73.0%	2.9%	2.9%	2.9%
32. Buses arrive and leave on time.	3.6%	10.9%	71.5%	6.6%	4.4%	2.9%
33. Buses arrive early enough for students to eat breakfast at school.	2.9%	8.8%	74.5%	5.1%	5.1%	3.6%
34. Buses seldom break down.	2.2%	10.2%	75.9%	2.9%	5.1%	3.6%
35. Buses are clean.	1.5%	11.7%	72.3%	4.4%	7.3%	2.9%
36. Bus drivers allow students to sit down before taking off.	3.6%	11.7%	70.8%	5.1%	5.1%	3.6%

F. SAFETY AND SECURITY

	CATEGORY					
STATEMENT	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
37. I feel safe and secure at school.	10.2%	38.0%	22.6%	20.4%	7.3%	1.5%
38. School disturbances are infrequent.	4.4%	31.4%	34.3%	21.2%	8.0%	0.7%
39. Gangs are not a problem in this district.	6.6%	28.5%	19.0%	24.1%	21.2%	0.7%
40. Drugs are not a problem in this district.	6.6%	8.8%	16.8%	27.0%	38.7%	2.2%
41. Vandalism is not a problem in this district.	4.4%	6.6%	17.5%	27.0%	42.3%	2.2%
42. Security personnel have a good working relationship with principals and teachers.	13.9%	43.8%	29.2%	6.6%	3.6%	2.9%
43. Security personnel are respected and liked by the students they serve.	8.0%	36.5%	32.8%	10.9%	9.5%	2.2%
44. A good working arrangement exists between the local law enforcement and the district.	5.1%	35.8%	48.2%	5.1%	3.6%	2.2%
45. Students receive fair and equitable discipline for misconduct.	5.1%	37.2%	27.0%	14.6%	12.4%	3.6%
46. Safety hazards do not exist on school grounds.	3.6%	12.4%	47.4%	22.6%	11.7%	2.2%

G. COMPUTERS AND TECHNOLOGY

STATEMENT	CATEGORY					
	STRONGLY AGREE	AGREE	NO OPINION	DISAGREE	STRONGLY DISAGREE	NO RESPONSE
47. Students have regular access to computer equipment and software in the classroom.	10.9%	33.6%	18.2%	24.8%	10.9%	1.5%
48. Teachers know how to use computers in the classroom.	13.1%	38.0%	21.9%	19.0%	5.8%	2.2%
49. Computers are new enough to be useful for student instruction.	7.3%	30.7%	24.1%	20.4%	16.1%	1.5%
50. The district offers enough classes in computer fundamentals.	6.6%	40.1%	25.5%	13.1%	13.1%	1.5%
51. The district meets student needs in advanced computer skills.	10.2%	30.7%	27.7%	16.8%	13.1%	1.5%
52. Teachers and students have easy access to the Internet.	13.1%	38.0%	19.0%	16.1%	11.7%	2.2%