

February 25, 2002

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

Fellow Texans:

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

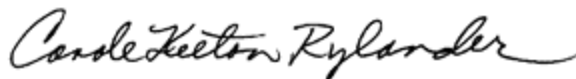
In August 2000, I released the results of my review of the district's operations. This review offered 90 recommendations that could save FBISD taxpayers a net of nearly \$11 million by 2004-05. The review also noted a number of FBISD's exemplary programs and model services provided by district administrators, teachers and staff.

After a little more than one year, we returned to check on how well the district's leadership put these proposals into practice. Over the last year, FBISD has implemented, or is in the process of implementing, 81 of the proposals, or 90 percent. While the district has realized net savings of \$2.1 million to date, it estimates net costs over five years to reach nearly \$1.1 million, primarily due to the long term cost of a much needed teacher pay raise.

This report is available on my Web site at www.window.state.tx.us/tspr/fortbendpr/.

Thanks for all that you do for Texas.

Sincerely,



Carole Keeton Rylander
Texas Comptroller

Introduction

In August 2000, the Comptroller of Public Accounts' Texas School Performance Review (TSPR) staff and consultants completed a comprehensive school review of the Fort Bend Independent School District (FBISD). During October 2001, TSPR staff returned to assess the district's progress in implementing the recommendations.

Since 1991, TSPR has recommended more than 5,500 ways to save taxpayers more than \$600 million over a five-year period in more than 63 public school districts throughout Texas. TSPR also conducts follow-up reviews of districts that have had at least one year to implement recommendations. These 42 subsequent reviews show that 90 percent of TSPR's combined proposals have been acted upon, saving taxpayers more than \$109 million, with the full savings estimated to grow in the future.

Improving the Texas School Performance Review

Upon taking office in January 1999, Texas Comptroller Carole Keeton Rylander consulted school district officials, parents and teachers and carefully examined past reviews and progress reports in an effort to make the Texas School Performance Review more valuable, even vital, to the state's more than 1,000 school districts. Having served as a teacher and later as a school board president, Comptroller Rylander has vowed to make TSPR more accountable to local school districts and the communities they represent.

Comptroller Rylander began by establishing new criteria for selecting school districts for future reviews. Priority now is given to districts judged to be poor-performing, academically or financially, and to reviews that will benefit the greatest number of students. To ensure that this process also serves small districts, reviews of numerous school districts in close proximity, regardless of academic or financial status are also done to achieve some economy of scale.

Recognizing that only about 52 cents of every education dollar is spent on instruction, Comptroller Rylander's goal is to direct more of every education dollar into the classroom. In addition, the Comptroller has acted to ensure that school districts' best practices and exemplary models will not be left buried inside individual TSPR reports. Instead, Comptroller Rylander has ordered best practices and exemplary programs to be shared quickly and systematically among all the state's school districts, and with anyone who requests such information. There is simply no reason for a district that has solved a problem to keep the solution to itself.

Comptroller Rylander has directed TSPR to serve as an active clearinghouse of the best and brightest ideas in Texas public education. Best practices identified in the original review of FBISD are included in the Comptroller's best practices database, "A+ Ideas for Managing Schools" (AIMS), which is accessible on the web at www.aimsdatabase.org.

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

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

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

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

TSPR in Fort Bend Independent School District

In March 2000, at the request of the Fort Bend Independent School District (FBISD) Board of Trustees, Texas Comptroller Carole Keeton Rylander began a performance review of FBISD. This review signaled the second time a school district's Board of Trustees took advantage of legislation enacted during the 1999 Legislative Session, which requires a district to pay 25 percent of the review's cost if a majority of the board

requests the review. On November 8, 1999, the FBISD Board of Trustees passed a resolution to request a review and pay up to \$87,500 toward the estimated \$350,000 cost. Superintendent Don Hooper followed up with a formal request of the review on December 7, 1999. On January 10, 2000, the Comptroller and the FBISD board president signed an interlocal agreement. TSPR began its review March 2, 2000.

After nearly six months of work, this report identified FBISD's exemplary programs and suggested concrete ways to improve district operations. If fully implemented, the Comptroller's 90 recommendations could result in net savings of nearly \$11 million over the next five years.

The TSPR team interviewed district employees, school board members, parents, business leaders and community members, and held community meetings in FBISD's seven high schools. To obtain additional comments, the review team conducted focus group sessions with parents, teachers, principals, business leaders and representatives from community organizations. The Comptroller also received letters from a wide array of parents, teachers and community members, and staff fielded calls to the Comptroller's toll-free hotline.

As a part of the review, 108 central administrators and support staff; 70 principals and assistant principals; 148 teachers and teacher aides; 272 parents; and 1,199 students completed written surveys. In addition, the Comptroller contracted with Telesurveys Research Associates of Houston, Texas to conduct a random telephone survey of 400 Fort Bend County households.

The review team also consulted two databases of comparative educational information maintained by the Texas Education Agency (TEA)-the Academic Excellence Indicator System (AEIS) and the Public Education Information Management System (PEIMS). FBISD selected peer districts for comparative purposes based on similarities in size, location, student enrollment and property values. The selected peer districts were Aldine, Austin, Katy, Plano, Round Rock and Cypress-Fairbanks ISDs. TSPR also compared FBISD to other school district averages in TEA's Education Service Center, Region 4, to which FBISD belongs and to the state as a whole.

In the 2001-02 school year, FBISD is serving 56,000 students in 8 high schools, 11 middle schools, 35 elementary schools, one Alternative Education Center, a Technical Education Center and a Progressive High School.

For 2001-02, FBISD's estimated property value reached \$202,240 per student, compared to the state average of \$215,121 per student.

Nineteen percent of FBISD's students are Hispanic, 28 percent are African-American, 36 percent are Anglo, 17 percent are Asian/Pacific Islander, and less than 1 percent are classified as Other. Nearly 20 percent of FBISD's students were classified economically disadvantaged in 2000-01.

FBISD earned a "Recognized" rating from the Texas Education Agency (TEA) during the 2000-01 school year. Prior to that, the district had consistently received an annual rating of "Academically Acceptable." In 2000-01, 70 percent of FBISD's campuses were ranked either Exemplary or Recognized. Of those campuses that received the TEA ratings, 20 schools were rated Exemplary, 15 schools were rated Recognized and 15 schools rated Acceptable.

For 2001-02, the district employs 7,039 employees, with teachers accounting for 3,746 or 53 percent of FBISD staffing. The district has budgeted expenditures of \$379.4 million for 2001-02. Fifty-six percent of FBISD's revenues were generated locally and 41 percent came from the state, while less than 2 percent came from the federal government, and 1 percent came from other sources.

FBISD underwent significant organizational changes in its senior leadership during the time since the review was completed. Superintendent Dr. Don Hooper retired, and the Board of Trustees appointed Dr. Betty Baitland as interim superintendent. Gary Crowell joined the district as an Area Superintendent shortly after the review began. Dr. Susan Wey was promoted to Area Superintendent, Charles Dupre was promoted to associate superintendent of Business and Finance and Linda Paschal joined the district as associate superintendent of Technology.

While the district has yet to complete some of TSPR's recommendations, the team assigned to conduct this one-year update found notable progress. Sixty-two recommendations have been implemented, 19 are in various stages of progress and nine have not been addressed.

FBISD officials rejected only one recommendation after conducting a cost analysis because they believed implementation did not benefit the district. (See Appendix A for details on the recommendations' status.)

Exemplary Programs and Practices

TSPR identified numerous "best practices" in FBISD. Through commendations in each chapter, the report highlights model programs, operations and services provided by FBISD administrators, teachers and staff members. Other school districts throughout Texas are encouraged to

examine the exemplary programs and services to see if they could be adapted to meet local needs. The TSPR commendations include:

Model strategic planning. FBISD's six-step strategic planning process contains detailed action plans that include implementation strategies, timelines and responsibility assignments. The district's budget is based on priorities set in the strategic plan, and the community participates in setting goals.

FBISD continues to plan strategically using a variety of methods and including a broad representation from district stakeholders. In addition to using the six-step planning process to complete the FBISD District Strategic Plan for 2000-2005, the district uses project task teams on an as-needed basis to address specific issues and programs. The seven management and planning tools of total quality often are incorporated into project teams to ensure the best results are achieved. Administrators use monthly project records to track progress and ensure completion of assignments.

Holding the line on legal costs. By employing an in-house attorney to handle routine administrative legal matters, as well as manage and monitor the fees and services of outside counsel, FBISD has effectively controlled its legal fees.

FBISD continues to employ in-house counsel as a strategy for controlling costs.

Conflict of Interest. The FBISD board strengthened its conflict of interest policy, which prohibits district employees from having a substantial business interest that could potentially conflict with their job responsibilities. The policy requires all management-level employees with primary purchasing responsibility to submit conflict of interest affidavits annually whether they have interests to disclose or not.

In addition to strengthening the conflict of interest policy, the district also incorporated a statement declaring any conflicts of interest in the explanatory summary of each agenda item at board meetings.

Exceptional community relations. The Community Relations staff has developed and implemented a wide array of community service programs designed to increase community participation and promote positive relationships between the district and its volunteers. The program's goals include (but are not limited to) increasing student achievement, increasing

parental involvement in education, and encouraging students and the community to participate in charitable activities.

Keeping the lines of communication open and productive continues to be a major focus for the district. In an effort to provide additional opportunities for parents and other community members to have more direct access to the superintendent and other central and campus administrators, the district is coordinating three districtwide Town Hall Meetings during the 2001-02 school year. The meeting format provides ample opportunity for parents to gain information and answers to their questions. Additionally, board members and district administrators are available during the second half of the meetings for topic-discussion roundtables to answer questions on an array of topics such as curriculum, technology, facilities and finance and campus-specific issues. Parents have expressed their appreciation for the roundtable format because it allows for a casual, less formal way to exchange information.

Education Foundation. Established in 1992 to benefit the students of FBISD, the Foundation provides funds to support innovative academic projects and staff development activities. A 39-member volunteer board of directors made up of local business, industry and community leaders governs the foundation. Since inception, the foundation has awarded nearly \$603,000 in grants to FBISD teachers and schools to support classroom instructional projects that are not funded through regular school budgets.

The Foundation implemented two new initiatives since the review: the Angel Grants Program and Foundation Auxiliary. The Angel Grants program provides funding for equipment and/or material needs for which no other source of funding is readily available. The Foundation Auxiliary creates community awareness and provides volunteer support for the Foundation.

Improving family literacy. FBISD established the Family Literacy Even Start Program to integrate early childhood education, parenting education and adult education into a program that serves at-risk students and economically disadvantaged families. The program provides a vehicle for parents, school and community to break the cycle of illiteracy. This family-centered education program enables parents to become partners in their children's education, helps children reach their full potential, and provides literacy training for parents. The program also uses collaborative

partnerships to involve parents and community members in reducing illiteracy among at-risk students.

FBISD has expanded the Family Literacy Even Start Program and added new sources of funding. The district received notification in September 2001 that it was awarded a \$164,278 Even Start Grant. Additionally, FBISD received, for the first time this year, Emergency Immigrant Education Program funds that are partially being used to expand family literacy services to immigrant families. The district opened a new family literacy site at Arizona Fleming Elementary School, and serves 100 families there with a waiting list. This is the second year that FBISD collaborated with Head Start to implement the Ready To Read Grant. District staff provides trainers who work with Head Start staff to implement effective early literacy instruction. The alignment of instruction between Head Start and FBISD assists Head Start students to successfully transition into the district's curriculum. Results from the Family Literacy Even Start Program continue to be positive. In 2000-01, the district served 410 families. Thirty-four students completed their GED and five participants received their United States citizenship. TAAS results for students whose families participate in this program continue to exceed those of similar students whose families do not participate.

Managing health plan costs. FBISD uses several strategies to control the overall cost of health care. The district bids out health insurance every three years and requires brokers and agents to sign agreements that define the agents' duties and responsibilities. The district also contracts directly with medical providers, which gives FBISD a role in setting rates. Finally, the district conducts annual claims audits with its third-party provider and has found payment accuracy rates of 100 percent, which validates its vigorous attempts to hold costs in check.

FBISD continues to use the above strategies to control the overall cost of health care.

Keeping workers' compensation costs low. FBISD's initiatives that were established through its Workers' Compensation Committee have reduced the district's costs. The committee, comprised of department heads and supervisory personnel, developed and implemented safety initiatives to control claims successfully. The initiatives include revising workers' compensation guidelines, shifting authority for safety to supervisors, and providing training to supervisors while involving employees in safety

initiatives. Involving employees in accident investigations raises safety awareness among all employees and offers them a stake in reducing accidents and lowering costs.

The district initiated a Safety Award Program that provides incentives to employee groups that maintain a safe work environment. Through these combined efforts, the district reduced workers' compensation claims by \$500,000 during 2000-01.

E-commerce. E-commerce technology allows the district to order and receive goods and services online, which reduces paperwork, while speeding up transactions. It also provides better management of large amounts of information, up-to-the-minute order tracking and reduced business-to-business costs.

FBISD uses e-commerce technology to procure office supplies and teaching and instructional materials. The district realizes additional savings through negotiated prices, reduced paper and processing costs due to a lower number of purchase orders and accelerated delivery.

Print Shop efficiency. The print shop operates on a complete cost recovery basis that produces operating profits, provides high quality services and charges competitive prices.

The district's Print Shop continues to run efficiently by operating on a complete cost recovery basis.

Financial awards received. FBISD's comprehensive annual financial report has been awarded certificates of achievement from the Government Finance Officers Association and the Association of School Business Officials for 1995-96, 1996-97, 1997-98 and 1998-99.

FBISD also received this award for 1999-2000.

Lower construction costs. FBISD controls new building construction costs by using building prototypes standards that maximize the efficiency of its school buildings.

Since the TSPR performance review, FBISD has opened five new schools: one high school, two middle schools and two elementary schools. A new high school and an elementary school are under construction and will open in August 2002. The district received an Environmental Protection Agency (EPA) grant for implementing the

"Tools for Schools" program at all campuses, and was named one of 19 school districts in the nation to receive the U.S. EPA 2001 Excellence Award for air quality.

Low meal prices. The district has generated a food service fund balance of more than \$3 million without increasing meal prices in 10 years.

FBISD continues to operate a profitable operation and thereby is able to hold meal prices down.

Transportation automation. To improve efficiency, FBISD uses computer programs in its Transportation Department. Routing software, maintenance scheduling software and fueling software keep the district's fleet running smoothly.

The computer programs continue to help FBISD maintain efficiencies in its Transportation Department.

Student safety programs. The Before It's Too Late program trains high school students to teach middle school children about drugs and alcohol. Through the Operation Kick-It program, selected inmates from the Texas Department of Criminal Justice share their experiences with drugs, alcohol and violence with FBISD students. The Gang Resistance Education and Training program teaches middle school students to resolve conflicts without violence and resist peer pressure to join gangs.

The district purchased Second Step, a violence prevention curriculum, and trained all elementary school counselors to implement it. The district directed elementary counselors to implement the Second Step curriculum as part of the Developmental Guidance Program. FBISD also implemented Teens Against Tobacco Use (TATU), a research-based, prevention program from the American Lung Association, at AHS, CHS, DHS, EHS, KHS and WHS high school campuses. Once the district trains high school students, it plans to implement the program in the middle and elementary schools. FBISD changed The Gang Resistance Education and Training program to the Crossing the Line program, and expanded the program to all middle schools. Crossing the Line covers the juvenile justice system, truancy, resistance to peer pressure, alcohol, tobacco and drug abuse, sexual harassment, hate crimes and discrimination. Police officers from the district and local law enforcement agencies deliver the program at grades 7 and 8.

FBISD police officers teach an eight-hour STAND/Dabblor Program for first-time offenders between the ages of 10 and 16. Local judges require these children and their parents to participate in this program, which includes a 'reality' visit to the Juvenile Detention Center, watching videos related to their offenses, writing an essay on preventing future recurrences and hearing success stories from role models.

During the 2000-01 school year, 341 cases (each case involves one student and his/her parent) participated in the STAND program. Since the program's inception, 1,688 students have participated.

Improved attendance rates. By implementing the Assisting Student Attendance Program to reduce the number of truanancies by notifying parents of student absences and conducting home visits, the district increased its average daily attendance (ADA) from 95.8 percent in 1998-99 to 96.5 percent in 1999-2000. FBISD received \$827,892 in additional state aid for 1999-2000 for increasing its middle school and high school ADA.

In order to prevent any high schools from being rated "low performing" because of dropout rates, the district added an additional phase to the Assisting Student Attendance Program (ASAP). This new phase in the ASAP consists of police officers locating and interviewing approximately 200 dropout students each year. The district either re-enrolls these students in school or signs up the students to complete a GED program.

Technology stipends. FBISD has developed a stipend program that attracts and retains technical staff. Often after the district trains technicians, they move into the business field for more pay. In addition to reimbursing the technical staff members for their certification, training and awards, the district provides a \$1,500 annual stipend for each test successfully completed toward technical certification.

The district also developed, and now offers, training courses that include the capabilities of specific modules in its Comprehensive Information Management System. District staff initiated this recommendation by forming a "super users" group and asking the group what it needed by way of training.

What Remains to be Done?

FBISD has made steady progress in implementing TSPR recommendations, particularly considering that it transitioned in a new superintendent during this time. Ninety percent of the TSPR recommendations either have been implemented or are being implemented at this writing. District administrators rejected one of the report's recommendations, and have provided their reasons for their delay or inaction on eight others. This section addresses the key areas requiring additional attention.

Campus Administrative Staffing Guidelines

FBISD administrators told TSPR that the board continues to study Recommendation 8, implement minimum staffing guidelines for elementary, middle and high schools to reflect differences in enrollment, for possible future implementation; however, they strongly feel the need to keep assistant principals in the classroom monitoring teachers' instruction. TSPR certainly recognizes the board's desire to maintain instructional monitoring and does not recommend that the district dismantle this practice. TSPR's analysis, however, showed the district was overstaffed with assistant principals in elementary and middle schools and understaffed with assistant principals in its high schools. TSPR also found inequitable distribution of secretaries and clerks throughout the schools. As such, the recommendation emphasized the district's need for minimum staffing guidelines that reflect differences in enrollment among schools and allow the equitable distribution of baseline administrative staffing.

TSPR strongly encourages the board to implement this recommendation because minimum staffing guidelines will allow the district to allocate more budget resources to the classroom after a thorough assessment of each school's administrative requirements

Internal Audit

FBISD made progress with two of four TSPR recommendations to improve the effectiveness of internal auditing. The district adopted a formal audit plan based on a risk assessment of its organization and is in the process of adopting a charter for the Internal Audit Department that references the Standards for the Professional Practice of Internal Auditing. The district decided, however, to continue to require that the internal auditor report to the CFO and superintendent. Additionally, the district did not hire an additional auditor because it was a low budgetary priority.

The internal audit function is a vital link in the system of internal controls. As such, each of these recommendations is designed to ensure that the Internal Audit has the structure, organizational authority and overall strategy to successfully fulfill its role in FBISD. A strong internal audit

function is a vital management tool that helps administrators and the board manage and govern the district. Consequently, TSPR encourages FBISD to reconsider its decision that the internal auditor not report to a standing audit committee of the board as this would ensure independence-one of the most important standards for internal auditors. And, while TSPR understands the need to prioritize the hiring of personnel, we urge the district to hire an additional internal auditor as soon as its budget allows to ensure reasonable audit coverage.

FBISD's Ideas for Improving the Texas School Performance Review

The Texas School Performance Review team does not assume that its process for performing school reviews works so well that it cannot be improved. Therefore, as part of the progress report preparation, TSPR asked FBISD staff members and administrators what went right and what went wrong-and how the process could be improved.

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

Fort Bend administrators and board members made the following observations:

According to the Interim Superintendent and the President of the Board, "the review made us really reevaluate ourselves and look inwardly to see where we needed to make significant improvements. Everyone is on board about the report." In addition, the administration felt that the process was well done, but like any process, there is always room for improvement. While the scheduling of interviews was well done, it may have been easier on some administrators to have had extra time in the interview and therefore, avoid added email and telephone time with the consultants. Some board members questioned why some trustees had been interviewed individually while others had been interviewed with other members present.

Additionally, some administrators voiced the fact that TSPR needed to have been more cognizant of issues facing "fast-growth" districts so that in

conducting a future audit of this type, the auditing team remains sensitive to the issues surrounding an ever-changing target. Others suggested that TSPR should consider shortening the report and thus make it easier for districts to tackle the very key areas that truly need attention.

Finally, on a more technical note, the district mentioned that another level of proofing would have been helpful and ideally would have liked to have seen one more meeting other than the "Findings Meeting" to have a chance to provide revisions, especially in the area of updating numbers one final time.

All of these are good recommendations and TSPR will give them careful consideration as it prepares for future reviews.

Fort Bend ISD Report Card

Chapter	# of Recommendations	Complete	In Progress	Not Implemented	Rejected	Percent Complete/ In Progress	Rating
District Organization and Management	10	7	3	0	0	70%/30%	Satisfactory
Educational Service Delivery	17	8	8	1	0	47%/47%	Satisfactory
Personnel Management	7	6	0	1	0	86%/0%	Excellent
Community Involvement	4	2	2	0	0	50%/50%	Satisfactory
Facilities Use and Management	5	3	1	1	0	60%/20%	Satisfactory
Asset and Risk Management	11	8	1	1	1	73%/9%	Satisfactory
Financial Management	7	3	2	2	0	43%/29%	Needs Work
Purchasing and Warehouse Services	7	5	0	2	0	71%/0%	Needs Work
Food Services	9	8	1	0	0	89%/11%	Excellent
Student Transportation	6	6	0	0	0	100%/0%	Excellent
Safety and Security	3	3	0	0	0	100%/0%	Excellent
Computers and Technology	4	3	1	0	0	75%/25%	Excellent
Overall Grade	90	62	19	8	1	69%/21%	= 90%

Excellent = More than 80% complete
 Satisfactory = 80% to 100% complete or in progress
 Needs Work = Less than 80% complete or in progress

TSPR Key Recommendations

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

District Organization and Management

Recommendation 1: Provide additional team-building training to board members and the superintendent.

According to administrators and a board member, this recommendation helped to focus the board on the fact that board members must set the tone and a positive example for the district. It forced board members to look critically at themselves and focus on the work of the district.

Recommendation 4: Improve executive reporting formats for the board.

According to a board member and the superintendent, this recommendation helped to clear up several misperceptions between the board and district staff. It forced all administrators to think about what information the board might need, and how they could use data to make the reports better for the board. The administration's goal is to enhance the executive reporting formats to provide the board with appropriate and pertinent data to make informed decisions.

Recommendation 9: Improve cultural diversity at all levels within the district's workforce and offer ongoing diversity training.

The development of cultural diversity training provided the most visible and tangible results of all the recommendations in this section because it involved everyone. The district hired a consultant to assist in developing a diversity-training program for teachers and administrators and worked with a community task force that held student and parent focus groups. FBISD also conducted Ruby Payne training and distributed the book entitled "Dealing with Adults and Children of Poverty" to all attendees. The district developed a long-range plan to institutionalize its commitment to diversity.

Educational Service Delivery and Performance Measures

Recommendation 21: Reassign non-counseling duties currently performed by counselors to non-certified personnel.

The district piloted this practice at three campuses. Evaluation results from the pilot schools showed decreased discipline referrals and higher satisfaction ratings from students and parents. All three campuses achieved Exemplary ratings on AEIS. A proposal to expand the program to other district campuses has been submitted for the 2002-03 school year.

Personnel Management

Recommendation 30: Develop a formal turnover reduction plan and track the results.

Administrators responded with an employment incentive plan that includes a basic annuity plan available for all employees. The district will add a longevity bonus of \$1,000 per year for three years to the 401(a) account and a deferred compensation savings plan of each staff member who commits to remaining on a selected campus for three years.

Recommendation 32: Raise FBISD teacher salaries to exceed average peer district salaries.

This recommendation supported administrators' beliefs that the most important district employee is the classroom teacher. As such, the recommendation helped district administrators to obtain approval for significant teacher salary increases from the board.

Community Involvement

Recommendation 35: Administer the parent and employee satisfaction surveys every other year instead of annually and follow up with department heads and campus administrators to ensure results are being used constructively.

FBISD now administers surveys via the district's Web site and conducts town hall meetings where senior level administrators are accessible to the community and are able to review instant feedback.

Facilities Use and Management

Recommendation 39: Create a consolidated comprehensive facilities master plan, and annually monitor the district's progress toward implementation.

District administrators cited this recommendation as important because of its positive effect on strategic planning. While the district already maintained several components of a facilities plan, the recommendation prompted the district to consolidate many facilities reports into a comprehensive facilities master plan, which will guide the district's future facilities strategic planning efforts.

Recommendation 40: Reassess current and future building plans and reallocate dollars to areas where facilities are needed to address enrollment and capacity needs.

This recommendation was one of the more significant ones in this section because it impacts parents, students, attendance zones and so many district operations. The recommendation provided administrators and staff with a more balanced approach to attendance zone changes in this fast-growth district.

Asset and Risk Management

Recommendation 50: Reinstate post-offer pre-employment screening as a means of reducing workers' compensation claims and costs.

Effective July 2000, the district re-instituted the Post Offer Physical Abilities Screens by contracting with NRG Wellness Center. As of the period ending May 31, 2001, NRG Wellness Center had evaluated 163 cafeteria applicants, 181 custodial applicants and 18 bus monitor applicants. District administrators said this recommendation was beneficial because it allows the district to detect problems prior to any offers of employment. The district estimates that it will save approximately \$1.8 million over five years.

Purchasing and Contract Management

Recommendation 64: Implement a procurement card system for purchases less than \$500.

The district piloted a prepaid card system for one semester that was so successful that it was implemented districtwide in July 2001. FBISD buys prepaid cards from vendors like Wal Mart in increments from \$100 to \$500. Cards are placed in an envelope with instructions provided to users. Users return the envelope with receipts of purchases. The district estimated savings at more than \$19,000 in order processing costs alone.

Recommendation 68: Enforce policies and procedures detailed in the Textbook Procedure Manual to ensure that sufficient textbooks are

available, and increase the percentage of textbook audits each year to minimize losses.

This recommendation has assisted the district in decreasing textbook losses by \$16,000. FBISD made policy changes that affect the way it handles lost textbooks. The district also provides two annual training sessions for both elementary and secondary campuses.

Transportation

Recommendation 83: Provide ASE certification training for all FBISD mechanics.

This recommendation has provided the district and mechanics with a win-win situation and has been a real morale-booster. The district now provides mechanics with certification training and stipends.

Safety and Security

Recommendation 85: Schedule monthly meetings of the director of Administrative Services, the chief of Police, the safe schools specialist and community services officers, to share information, coordinate programs and establish priorities for the district's prevention and intervention programs.

One of the benefits from this recommendation is that it has allowed administration to report campus discipline referrals to the board regularly and to implement corrective measures.

Management Information Systems

Recommendation 87: Develop an accurate student-to-computer ratio.

This recommendation had a tremendous impact on how the district inventories and classifies its computers. The Instructional Technology Specialist revised the district's student-to-computer ratio calculation to include only those computers that are "student touched." As such, the district now maintains an accurate student-to-computer ratio. The district plans to use the revised inventory as a baseline for future counts.

Recommendation 89: Identify funding strategies to fully fund the district's long-range technology goals and dedicate money obtained through E-Rate and other grants to this end.

The Technology Department secured approximately \$3.5 million in technology grants. Grants like the Intel/Microsoft/A&M University

"Teach to the Future" not only provided 21 master teachers with a laptop computer worth \$2,500, but also provided an additional \$5,000 per teacher for classroom technology. The Marco Polo World COM Sponsorship, a staff development initiative, received an estimated \$15,000 for Internet integration lessons and four free days of training. The district has applied for and received multiple Telecommunications Infrastructure Fund Grants including TIF P58, TIF P59 and a TIF Community Networking Grant. In addition, the district has applied for a Renovation and Technology grant worth \$410,000.

Appendix A: Status of Recommendations and Savings

Chapter 1: District Organization and Management

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	FBISD's Projected Five-Year Savings (Costs)	Comments
1	Provide additional team-building training to board members and the superintendent. p. 29	Complete	(\$12,500)	\$0	\$0	In September 2000, the FBISD board directed the superintendent to collect information about team-building training and facilitators. In November 2001, the board selected a facilitator and attended the first team-building retreat. The board scheduled its second team-building retreat for February 2002 with annual team-building retreats to occur thereafter.
2	Reduce the number of regular board meetings to one meeting per month. p. 30	In Progress	\$0	\$0	\$0	The superintendent drafted a local board policy that reduced the number of regular board meetings to one regular meeting per month for board approval in July 2001. The board, however, decided to place this recommendation on hold to facilitate the interim superintendent's need to meet more regularly. The board president said that the board will continue to work on this recommendation and hopes to adopt a monthly meeting format as soon as

						it is feasible.
3	Create a minimum of three standing committees of the board. p. 31	Complete	\$0	(\$3,600)	(\$3,600)	To more closely conform to the district's needs, the board decided to add board members to five committees rather than create new standing committees. FBISD maintains a Facilities Committee, a Policy and Procedures Committee, an Audit Committee, a Bond Planning 2003 Committee and a Zoning Committee. Board members said that this arrangement facilitates a better working relationship between the committees and the board. In addition, board members are invited to serve on special-issue committees such as the Technology Committee and the Innovative Programs Committee.
4	Improve executive reporting formats for the board. p. 33	Complete	\$0	\$0	\$0	The superintendent, in conjunction with the superintendent's cabinet, developed new reporting formats for executive briefings, finance summaries and grades reporting. Board members said that district administrators would revise other reporting formats, as needed. The administration's goal is to enhance the executive reporting formats to provide the board with pertinent data to make informed decisions.

5	Provide specific and targeted continuing education opportunities to board members. p. 34	Complete	(\$12,500)	\$0	\$0	The board president and the board's recording secretary send quarterly correspondence to board members regarding specific board training opportunities for members to attend. In addition, board members receive weekly information packets that list relevant training sessions based on topics of interest for each member. The board plans to continue attending targeted TASB-sponsored continuing education training.
6	Conduct annual retreats with the board as a part of the ongoing strategic-planning process. p. 38	Complete	\$0	\$0	\$0	While the board always conducted annual retreats every February, it decided to combine the strategic planning retreat with the team-building retreat and have the facilitator lead a visioning session to establish a shared vision for the district.
7	Apply policies on staff performance related to student achievement fairly and consistently across the district. p. 46	In Progress	\$0	\$0	\$0	FBISD's staff attorney drafted a revision of policy DN (Local) to go before the board for approval in December 2001. To compliment the revised policy, the district administrative procedures will ensure that student performance initiatives are equitable across the district. The administrative procedure will identify specific roles and responsibilities in implementing pilot initiatives. Appraisal

						records and forms, reports, correspondence and memoranda may be placed in each employee's personnel records to document performance.
8	Implement minimum staffing guidelines for elementary, middle and high schools to reflect differences in enrollment. p. 55	In Progress	\$7,554,715	\$0	\$0	While the board continues to study this recommendation, it believes it cannot remove assistant principals from the elementary and middle school settings at this time. The district feels strongly that the assistant principals need to be in the classrooms monitoring teachers' instruction. The district, however, is providing base-line staffing guidelines for campus para-professionals, and uses enrollment benchmarks to guide the allocation of campus administrative staff. The district also will continue to study national benchmark guidelines from other school districts while studying the future implementation of this recommendation.
9	Improve cultural diversity at all levels within the district's workforce and offer ongoing diversity training. p. 58	Complete	\$0	\$0	\$0	The Staff Development, Leadership and Student Support Services departments developed a diversity-training program for teachers and administrators. The district hired a consultant to assist in this endeavor and worked with a community task force that

						held student and parent focus groups. FBISD also conducted Ruby Payne training and distributed the book entitled "Dealing with Adults and Children of Poverty" to all attendees; created a diversity video; and developed a long-range plan to institutionalize the district's commitment to diversity.
10	Add principals' representation from elementary, middle and high schools to the superintendent's cabinet. p. 61	Complete	\$0	\$0	\$0	The district decided to conduct two meetings per month with all principals. One meeting will be held between the administrative team and principals and the other with curriculum staff and the principals. The district will review the need for further communication.
	Totals: Chapter 1		\$7,529,715	(\$3,600)	(\$3,600)	

Appendix A: Status of Recommendations and Savings
Chapter 2: Educational Service Delivery

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	FBISD's Projected Five-Year Savings (Costs)	Comments
11	Hire a full-time secretary for the Grants Coordinator. p. 79	In Progress	(\$66,550)	\$0	\$0	In February 2001, the district drafted a job description for a full-time Grants secretary. Because of four new campuses and other higher priorities, however, the district has not filled the position. This position may be considered for the future.
12	Review all instruction-related policies every five years and ensure that policies match actual district practices. p. 82	Complete	(\$2,624)	\$0	\$0	The district conducted a comprehensive review of its instruction-related policies and created five committees to oversee the review. The district also created a matrix that contains all of the new policies and procedures.
13	Require campus principals to develop and implement dropout prevention programs. p. 84	Complete	\$0	\$0	\$0	FBISD now includes dropout plans in the district's Campus Improvement Plans (CIPs). The district also requires principals to report drop out prevention efforts to their area superintendent on a quarterly basis.
14	Update the	Complete	\$0	\$0	\$0	The district used an

	curriculum plan to include completion dates for the development of district assessments. p. 85					outside consultant to assist in the development of district assessments. In addition, the district's Curriculum Committee developed a matrix of staff development and assessment plans that the committee placed in a district curriculum assessment calendar. The calendar lists the types of assessments and systems that the district will use, the dates of tests and the dates of the assessment reports availability.
15	Review criteria and procedures used for identifying students for the gifted and talented program. p. 89	In Progress	\$0	\$0	\$0	FBISD formed a committee to look for patterns of over- and under-identification of Gifted and Talented students. Now, more nominations occur from campuses with less than 3 percent of students identified as eligible for the Gifted and Talented program.
16	Update the Gifted/Talented 5-Year Improvement Plan. p. 90	Complete	\$0	\$0	\$0	FBISD convened a parent advisory committee to review the Gifted/Talented 5-Year Improvement plan and make appropriate modification recommendations.

						where necessary.
17	Identify sources of funding to reduce Advanced Placement examination fees to encourage minority participation in the Advanced Placement program. p. 93	Complete	\$0	\$0	\$0	Secondary principals developed a plan to encourage and increase the participation rate of minority students in more accelerated classes. The district also drafted guidelines for teacher training in Advanced Placement (AP) courses. The state provided funds for exam fees and reduced the amount for an AP examination to \$5 per economically disadvantaged student.
18	Hold sending principals accountable for providing complete information for special education students reassigned to Behavior Learning Center by including compliance as a criterion in professional evaluation. p. 98	Complete	\$0	\$0	\$0	FBISD conducted meetings in the summer of 2001 with the Behavior Learning Center (BLC) staff and the area superintendents. During the meetings, the BLC staff and the area superintendents developed procedures regarding how assignments were made for each special education student attending the facility. Special attention was given to the <i>Principal's Report</i> and the Individual Education Plans (IEPs) to make sure that they were

						complete and identified all needed materials for the success of the students who were placed at the BLC.
19	Require bilingual/ESL students to practice with old TAAS tests throughout the year to guide instruction. p. 102	In Progress	\$0	\$0	\$0	District administrators surveyed principals regarding the use of benchmark tests for bilingual students and held meetings at each bilingual campus to discuss how teachers use the test data. In addition, bilingual coordinators and facilitators developed a training schedule based on needs assessment data that will address the use of assessment data to enhance instruction. A best practices document was complete in December 2001. The district is administering benchmark tests to bilingual students for instructional planning.
20	Provide Grades 4 and 5 bilingual/ESL teachers with detailed performance analyses of alternative assessment data in a timely manner, and provide training so data can be used for instructional	Complete	\$0	\$0	\$0	FBISD created a training schedule for analyzing data and instructional planning. In August 2001, the district's bilingual and ESL coordinators and facilitators worked with teachers to develop goals based

	planning. p. 103					on assessment data. The district also developed mentoring plans, surveyed the principals regarding current use of alternative assessment data in bilingual/ESL grades 4 and 5 and held meetings with teachers to determine how they use alternative assessment data.
21	Reassign non-counseling duties currently performed by counselors to non-certified personnel. p. 105	Complete	\$0	\$0	\$0	The district reassigned non-counseling duties and created a Developmental Guidance Steering Committee that meets monthly. The committee piloted this practice at three campuses and developed the infrastructure for a Comprehensive Developmental Guidance Program. The team developed a draft Developmental Guidance Program manual that currently is under review by staff. Evaluation results from the pilot schools showed decreases in discipline referrals and higher satisfaction ratings from students and parents. All three campuses earned

						Exemplary ratings on the TAAS. A proposal to expand the program to other district campuses has been submitted for 2002-03.
22	Hire additional counselors to provide adequate counseling services to students. p. 106	In Progress	(\$4,987,270)	(\$115,890)	(\$579,450)	To date, FBISD has hired three new high school counselors, which gives the district a high school student-to-counselor ratio of 398 to 1.
23	Evaluate school-based Career and Technology Education programs according to special criteria, including enrollment patterns. p. 112	In Progress	\$0	\$0	\$0	A district taskforce developed procedures to evaluate school-based Career and Technology (CATE) programs and distributed them to the superintendent's cabinet for review. The procedures include evaluation of courses with under-enrollment that may need consolidation.
24	Use annual review of Individual Academic and Career Plans for students in grades 8-12 to improve student program planning. p. 113	In Progress	\$0	(\$1,500)	(\$1,500)	The Developmental Guidance Steering Committee is working collaboratively with the Career and Technology Department on a plan that tracks students from grade 7 through post-grade 12. The district purchased a curricular guidance program from Austin ISD to use as a model.
25	Provide training to	Complete	\$0	\$0	\$0	While this

	teachers to use campus-level detailed TAAS performance analysis in effective instructional planning. p. 118					recommendation is complete, FBISD sees it as an on-going process. FBISD, however, and others to develop the most effective staffing guidelines for the district. updated local policy EG and now trains teachers through a "Prep Plan" program, which uses student data to make sure teachers effectively prepare lesson plans.
26	Implement staffing allocation guidelines for school nurses and clinical assistants that are based on student health needs and student enrollment. p. 121	In Progress	\$835,179	\$0	\$0	FBISD made a visit to Austin ISD to review the Seton Program but found that Austin's model probably would not work in Fort Bend. Unlike FBISD, which uses Registered Nurses in its student health program, Austin ISD uses Licensed Vocational Nurses in its program. FBISD, however, continues to study the Austin model and others to develop the most effective staffing guidelines for the district.
27	Analyze the cost-benefit impact of contracting with a local health facility to manage the school health program. p. 122	Not Implemented	\$0	\$0	\$0	The district still is gathering and reviewing data for this recommendation.

	Totals: Chapter 2		(\$4,221,265)	(\$117,390)	(\$580,950)	
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Appendix A: Status of Recommendations and Savings
Chapter 3: Personnel Management

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	FBISD's Projected Five-Year Savings (Costs)	Comments
28	Provide a one time signing bonus of \$1,500 for teachers recruited to fill positions in high-need campuses. p. 139	Not Implemented	(\$59,063)	\$0	\$0	District administrators said that because the district was 99.5 percent staffed when school began in September 2000, the district did not need to implement this recommendation immediately. The district approached this recommendation differently by initiating a number of instructional leadership changes. It created administrative teams to assist in staffing campuses and Human Resources aggressively recruited teachers, both nationally and internationally, to provide a qualified pool of teachers from which the administrative teams to select. District administration also is investigating budget opportunities to provide a \$1,500 stipend for Special

						Education teachers.
29	Establish policies and procedures that address excessive absences, and provide incentives to teachers with good attendance. p. 140	Complete	\$249,680	\$116,228	\$581,140	FBISD developed an incentive program with an attendance bonus component; included teachers' attendance as part of the principal's appraisal; and provided six-week, semester and end of year recognition for teachers with perfect attendance. The district also reduced absences by 7000 days by closely monitoring business days. The district not only has more teachers in the classroom, but also realized more than \$116,000 savings of substitute costs.
30	Develop a formal turnover reduction plan and track the results. p. 144	Complete	\$0	\$0	\$0	The district developed a plan that encourages staff retention with a special focus on campuses with historically high turnover rates. Through the new Employee Incentive Plan, the district established a deferred compensation savings plan, 401(a), on behalf of each employee contributing to his or her own.

						<p>established 403(b) account. The district will add a longevity bonus of \$1,000 per year for three years to the 401(a) account of each staff member who commits to remaining on a selected campus for three years. The district's Human Resources Department will evaluate turnover rates annually and will sponsor a five-year longitudinal study of the impact of the Employee Incentive Plan.</p>
31	<p>Revise the district's compensation philosophy and strategy to include a framework for the design of employee compensation. p. 150</p>	Complete	\$0	\$0	\$0	<p>FBISD revised its compensation philosophy after consulting with a TASB compensation representative. The district provides a compensation structure based on job classification with a pay system designed to be competitive with the job market. The Human Resources Department will use various strategies to maintain a competitive stance with other peer districts by conducting area surveys and using</p>

						the information from the results of the surveys to revise salary schedules.
32	Raise FBISD teacher salaries to exceed average peer district salaries. p. 152	Complete	(\$6,472,000)	(\$1,873,000)	(\$9,365,000)	The district used research data gathered from surveys, salary schedules of surrounding districts, data gathered by Region IV and data compiled by TASB to form a competitive teachers' salary schedule. The Human Resources Department also focused on manual trades and paraprofessional job categories. The district reclassified a number of jobs to enhance its competitiveness within the market. While the district raised teacher salaries beyond TSPR's original suggestion, the costs reflect TSPR's estimate of a \$500 salary increase per teacher (3,746 teachers in 2001-02).
33	Centrally coordinate staff development functions, such as identifying staff	Complete	\$0	\$0	\$0	The director of Staff Development used a steering committee to develop a long-range

	development activities and facilitating of employee training. p. 157					comprehensive plan for the coordination and evaluation of all district staff development. The plan includes campus-based staff development initiatives and focuses on reducing duplicative or inappropriate professional development for staff members who deliver instruction. The plan also will evaluate staff development initiatives to determine effectiveness of training as measured by improvement in student academic performance and development of character.
34	Develop and offer a new employee orientation to all new district employees on a quarterly basis. p. 160	Complete	\$0	\$0	\$0	The Human Resources Department and the Staff Development Department developed an action plan for new employee orientation. Representatives from each department served on a task force to develop a task map for implementation, an agenda with a selection of dates for

						new employee orientations, administrator training sessions for new and current administrators, online registration for training sessions and training for campus/department facilitators to coordinate training when using training video.
	Totals: Chapter 3		(\$6,281,383)	(\$1,756,772)	(\$8,783,860)	

Appendix A: Status of Recommendations and Savings
Chapter 4: Community Involvement

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	FBISD's Projected Five-Year Savings (Costs)	Comments
35	Administer the parent and employee satisfaction surveys every other year instead of annually and follow up with department heads and campus administrators to ensure results are being used constructively. p. 169	Complete	\$25,600	\$12,800	\$25,600	FBISD will pilot a new way to administer parent and employee satisfaction surveys by conducting these surveys every other year via the district's Web site. The district planned the next survey for the 2003-04 school year. FBISD also gathered community input by conducting three town hall meetings.
36	Create an ombudsman position as a means of establishing better two-way communication between the district and the community. p. 171	In Progress	(\$220,604)	\$0	\$0	The district has written a job description for the new position, which indicates that the ombudsman will be responsible for providing assistance in obtaining early resolution to problems involving students, staff, parents and other community members.
37	Broadcast district board meetings on a local cable television station. p. 174	In Progress	\$0	\$0	\$0	Currently, no local city cable station is available that can broadcast FBISD's board meetings live. The only cable station is in Missouri City. The district plans to monitor and pursue this recommendation

						when a station becomes available.
38	Establish pilot parental involvement agreements at schools where parental involvement has been low. p. 181	Complete	\$0	\$0	\$0	Five of the 13 schools identified in the original report are Title 1 schools and already are mandated by law to involve parents annually in the development of School-Parent- Student Compacts. In an effort to promote Parental Involvement Agreements on campuses that are not Title 1 schools, the district formed a committee to develop a document entitled <i>Parents Rights and Responsibilities</i> that outlines the expectations of both the district and parents. The committee was comprised of Volunteers in Public schools, Parent Advisory Council members, Parent Resource Center coordinators and administrators. In 2000-01, the district's student handbook included the <i>Parents Rights and Responsibilities</i> document.
	Totals: Chapter 4		(\$195,004)	\$12,800	\$25,600	

Appendix A: Status of Recommendations and Savings
Chapter 5: Facilities Use and Management

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	FBISD's Projected Five-Year Savings (Costs)	Comments
39	Create a consolidated comprehensive facilities master plan, and annually monitor the district's progress toward implementation. p. 196	Complete	\$0	\$0	\$0	FBISD developed a long-range facilities plan that encompasses seven volumes including; History, Demographics, Planning, Project Tracking, Construction Standards, Education Specifications, and Bond Planning.
40	Reassess current and future building plans and reallocate dollars to areas where facilities are needed to address enrollment and capacity needs. p. 199	Complete	\$0	\$0	\$0	The district formalized its future building plans in its long-range facilities plan and assessed the district's growth and forecasts to ensure equitable funds allocations. Area superintendents will meet in mid-year starting in

						December 2001.
41	Develop and distribute a utility cut-off manual to Maintenance staff. p. 205	Complete	(\$1,000)	(\$1,000)	(\$1,000)	The district created a school layout of color-coded valves and utility lines to enable maintenance workers to easily locate the valves when making needed repairs. The district provided every campus and maintenance truck with a copy of the color-coded layout.
42	Sell district vehicles that are driven less than 10,000 miles per year. p. 209	Not Implemented	\$6,000	\$0	\$0	The district felt that it would be an imposition to ask employees to use their own cars at this time because the district's low-mileage vehicles contain special tools or serve specialized purposes not available in employees' personal vehicles.
43	Complete the lighting, ballast and exit light retrofit program on all remaining schools. p. 212	In Progress	\$679,200	\$135,840	\$679,200	The district completed some of this recommendation in the 2000-01 and 2001-02

						<p>budgets by replacing some lighting and ballasts. In December 2001, the district awarded a performance contract to complete the remaining portion of work. It is a 10-year performance contract where equipment is installed over the next 10 years. To date, FBISD has realized savings of approximately 20 percent, or \$135,840, of TSPR's original estimate. The district anticipates continued savings as equipment is replaced.</p>
	Totals: Chapter 5		\$684,200	\$134,840	\$678,200	

Appendix A: Status of Recommendations and Savings
Chapter 6: Asset Risk and Management

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	FBISD's Projected Five-Year Savings (Costs)	Comments
44	Perform vault services in-house with existing staff. p. 220	Rejected	\$166,213	\$0	\$0	FBISD conducted a cost analysis but decided that this recommendation was not feasible for this district.
45	Convert the operating account to a controlled disbursement account. p. 221	Complete	\$86,193	\$0	\$0	The district converted the operating account to a controlled disbursement account in January 2001.
46	Acquire portfolio management software to streamline investment management and accounting. p. 222	Complete	(\$26,000)	(\$25,000)	(\$25,000)	In September 2000, the board approved the purchase of investment management software.
47	Expand investment procedures to include a discussion of the control activities necessary to ensure that management's objectives for safeguarding district investments are met. p. 224	Complete	\$0	\$0	\$0	The district expanded its investment procedures to include a discussion of the control activities necessary to ensure that management's objectives for safeguarding district investments are met.
48	Develop strategies to increase participation in the next benefit survey. p. 233	In Progress	\$0	\$0	\$0	The district continued the use of an employee benefits survey online that was attached to the online benefits enrollment system. The valuable information

						gathered from the survey responses will assist the district as it seeks to continually improve the employee benefits offered.
49	Reconsider the decision not to renew the contract with FBISD's former Section 403(b) and Section 457 plan administrator. p. 235	Complete	\$0	(\$15,000)	(\$25,000)	The board did not want to renew the contract with the former 403(b) and Section 457 plan administrator. Instead, the district brought the function in-house with the assistance of a consultant.
50	Reinstate post-offer pre-employment screening as a means of reducing workers' compensation claims and costs. p. 243	Complete	\$386,973	\$360,000	\$1,800,000	Effective July 2000, the district re-instituted the Post Offer Physical Abilities Screens by contracting with the NRG Wellness Center. Pre-employment screenings proved to be successful and saved the district \$360,000 in the first year of implementation. The district invested \$140,000 in incentives. NRG Wellness Center evaluated 163 cafeteria applicants, 181 custodial applicants and 18 bus monitor applicants.
51	Develop a districtwide safety manual. p. 244	Complete	\$0	(\$1,600)	(\$1,600)	Rather than creating one safety manual, FBISD purchased a variety of documents targeted at certain audiences regarding safety.
52	Develop additional workers' compensation	Complete	\$0	\$0	\$0	FBISD now generates monthly reports on a single schedule that

	performance measures, and consolidate existing measures on a single schedule for reporting and monitoring purposes. p. 246					includes performance measure data located in one area. The district plans to become self-insured.
53	Raise the fixed assets capitalization threshold to \$5,000 for assets accounted for in the Fixed-Asset Group of Accounts. p. 251	Complete	\$0	\$0	\$0	The district raised the fixed asset threshold to \$5,000 in September 2000.
54	Assign location codes to areas within building such as offices, cubicles and workstations to expedite the process of locating fixed assets during the physical inventory. p. 252	Not Implemented	\$0	\$0	\$0	The district still is considering this recommendation. Currently, the district uses sub-location codes.
	Totals: Chapter 6		\$613,379	\$318,400	\$1,748,400	

Appendix A: Status of Recommendations and Savings
Chapter 7: Financial Management

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	FBISD's Projected Five-Year Savings (Costs)	Comments
55	Prepare budget amendments when expenditures will exceed budgeted revenues. p. 262	Complete	\$0	\$0	\$0	District administrators said that the district always has prepared budget amendments when expenditures exceed revenues and that this recommendation originated from a one-time incident.
56	Establish a budget-monitoring process and provide managers with monthly budget reports including salary and stipend information. p. 262	In Progress	\$0	\$0	\$0	The district developed monthly budget reports for managers to monitor their budgets. District staff, however, continue working out a problem with the system, which shows all personnel salaries districtwide instead of salaries in a particular department or campus. A district administrator said the second part of this recommendation regarding the inclusion of salary and stipend information in the monthly budget reports is not beneficial to principals because all salaries and benefits are included in the Human Resources Department's budget.
57	Create a standing audit	Not	\$0	\$0	\$0	The board opted to

	committee of the board that directs and mentors the internal audit function in auditing and investigating operational and financial matters of the district. p. 266	Implemented				continue with its existing structure. The district worked with Null-Lairson, its external audit firm, to develop a scheduled plan for conducting internal audits and gave responsibility to the Chief Financial Officer for oversight of the auditor's day-to-day activities. The internal auditor reports to the superintendent and provides all reports directly to the superintendent.
58	Adopt a charter for the Internal Audit Department that references the Standards for the Professional Practice of Internal Auditing as promulgated by the Institute of Internal Auditors. p. 267	In Progress	\$0	\$0	\$0	The district began drafting a charter, but has not yet completed it. A district Audit Committee reviews the audit plan to guide the Audit Department's work, but the committee does not receive reports.
59	Adopt a formal audit plan based on a risk assessment of the FBISD organization to direct the Internal Audit Department's focus to the district's high-risk operational areas. p. 270	Complete	\$0	\$0	\$0	Null-Lairson worked with the district to draft a formal audit plan based on a risk assessment of the district's organization. A three-member Audit Committee assesses the areas of most risk and reports its recommendations to the superintendent.
60	Hire one additional Internal Auditor. p. 271	Not Implemented	(\$199,152)	\$0	\$0	The district wants to hire another auditor, but an additional auditor is not a budget priority at this time.

61	Promptly review all differences between purchase orders, receiving reports and invoices listed on the weekly exception report to expedite vendor payments. p. 273	Complete	\$49,295	\$0	\$0	The district now is current with reviewing all differences on the weekly exception report. The CFO said the district does not anticipate savings from this recommendation because it never paid late fees.
Totals: Chapter 7			(\$149,857)	\$0	\$0	

Appendix A: Status of Recommendations and Savings

Chapter 8: Purchasing and Warehouse Services

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	FBISD's Projected Five-Year Savings (Costs)	Comments
62	Implement a commodity code system to monitor and ensure compliance with purchasing regulations. p. 286	Complete	\$406,691	\$0	\$0	FBISD administrators said that this recommendation resulted from the original review occurring during the district's conversion to a new accounting system. The district maintained a commodity code system on the previous accounting system and operated without commodity codes only for about 18 months. The new accounting system required custom programming to accommodate the commodity codes. As such, the district did not realize additional savings because it merely reinstated the use of commodity codes.
63	Update the purchasing procedure manual to reflect processes and forms required by the new CIMS administrative software. p. 288	Complete	\$0	\$0	\$0	The district updated its purchasing procedures manual to include the processes and forms required by the new administrative software. The district placed the updated manual on its Web site for access by all employees and distributed hard copies

						to all budget managers.
64	Implement a procurement card system for purchases less than \$500. p. 290	Complete	\$293,244	\$19,050	\$190,500	While FBISD chose not to use credit cards, it implemented a pre-paid card system on July 1, 2001, after piloting the system for one semester. The district buys the cards from Wal Mart and Sams in \$100 or \$500 increments at the request of budget managers. After every pre-paid card purchase, district staff places accompanying receipts in an envelope. District administrators said their biggest problem to solve with the use of the prepaid cards was who would review the receipts for compliance with purchasing policies. The district solved this problem by requiring Accounts Payable to review the receipts. The district estimates \$19,050 in savings to date based on its processing of approximately 127 Wal Mart blanket purchase orders at about \$150 each during the same period last year (July 2000 through October 2000).
65	Revise board policy to eliminate prior board approval of state contract purchases for \$25,000 and more. p. 292	Not Implemented	\$0	\$0	\$0	The board elected not to implement this recommendation at this time, but will review it again in the near future.

66	Purge the vendor list to create an approved vendor list, establish a vendor evaluation process and establish a purchasing policy that encourages HUB vendor use. p. 294	Complete	\$0	\$0	\$0	While the district implemented this recommendation, its vendor database system presents limitations whereby it cannot completely purge vendors.
67	Establish a policy to increase the use of purchasing cooperatives. p. 296	Not Implemented	\$1,519,556	\$0	\$0	While the district has documented the practice in the purchasing procedures manual, steps have not been taken to increase the use of purchasing cooperatives when the district determines that cooperatives are most cost effective.
68	Enforce policies and procedures detailed in the Textbook Procedure Manual to ensure that sufficient textbooks are available, and increase the percentage of textbook audits each year to minimize losses. p. 302	Complete	\$70,745	\$16,000	\$80,000	The district now regularly audits campuses and has increased the number of physical audits of each campus. The district made policy changes that affect the way district staff handle textbook losses that occur in the Fall. FBISD also provided two in-service training days for both secondary and elementary campuses where it emphasized the need to decrease campus textbook losses. District officials now pay special attention to those campuses that incur excessive losses. As a result, the district realized a minimum decrease of \$16,000 in total textbook losses to

						date.
	Totals: Chapter 8		\$2,290,236	\$35,050	\$270,500	

Appendix A: Status of Recommendations and Savings
Chapter 9: Food Service

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	FBISD's Projected Five-Year Savings (Costs)	Comments
69	Establish meals per labor hour district standards to evaluate productivity and modify staffing levels at each campus. p. 317	Complete	\$1,330,998	\$0	\$0	District officials said the Child Nutrition Department historically has carefully and accurately monitored costs as evidenced by its consistent profits. The department continues to maintain a healthy profit margin even though the district has not raised food prices in 11 years. The district satisfied this recommendation by establishing and formalizing a districtwide 15 meals-per-labor-hour benchmark in its procedures manual, but did not see a need to change its practices. The district, therefore, did

						not realize savings.
70	Identify kitchens with high absentee rates and implement corrective action plans including disciplinary action and incentive programs to encourage attendance. p. 320	Complete	(\$34,750)	\$0	\$0	The district took care of the software problem it had with tracking absenteeism and implemented effective training sessions.
71	Develop and implement a plan to recognize cafeteria staff who complete certification classes. p. 321	Complete	(\$197,500)	\$0	\$0	District officials said they always have recognized staff members who complete certification classes by presenting them with plaques and certificates. The district found that stipends were cost-prohibitive.
72	Solicit input from students, parents and faculty regarding food quality, quantity, price, variety, nutrition and any other areas of food operations and implement corrective action where needed. p. 322	In Progress	(\$53,000)	\$0	\$0	The district formalized a survey to obtain feedback from students and faculty regarding all menu items.
73	Establish a district policy to control the sale of foods in competition	Complete	\$0	\$0	\$0	The board approved a policy to control the sale of food

	with meals served under the National School Lunch and Breakfast Programs. p. 325					in competition with meals served under the National School Lunch and Breakfast Programs.
74	Establish breakfast programs at the 10 campuses without one, and develop strategies to increase overall breakfast participation at all campuses. p. 334	Complete	\$1,409,013	\$8,000	\$95,000	As of September 2001, all FBISD schools offer breakfast. In one month, the district recognized increased breakfast revenues of about \$2,000, which represents an annualized (9.5 months) increase of \$19,000.
75	Develop and implement a comprehensive nutrition program for FBISD students. p. 335	Complete	\$0	\$0	\$0	District officials said the district always has offered a nutrition education program on a voluntary basis. The district implemented a broader-based program for all cafeterias that includes more publicity about the program, including brochures, pens and pencils for participating students.

76	Compile and distribute accurate, detailed and useful campus-specific financial and performance reports to cafeteria managers on a quarterly basis. p. 339	Complete	\$0	\$0	\$0	Cafeteria managers now receive campus-specific financial and performance reports to monitor expenditure information.
77	Allocate an equitable share of building utilities and maintenance to food service operations. p. 340	Complete	\$6,162,015	\$0	\$0	The district now moves funds between its general fund and the food service fund. District officials did not recognize savings because they maintain that this practice does not generate revenue, despite the previously restricted fact that dollars are now made available to the general operating budget.
Totals: Chapter 9			\$8,616,776	\$8,000	\$95,000	

Appendix A: Status of Recommendations and Savings
Chapter 10: Transportation

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	FBISD's Projected Five-Year Savings (Costs)	Comments
78	Add performance measures to the contract for managing the Transportation Department to ensure that the contractor is responsible for managing the department effectively and efficiently. p. 346	Complete	\$0	\$0	\$0	The district developed performance measures and criteria. The board, however, opted not to renew the existing transportation management contract when it expires in August 2002. The district plans to bring the operation in-house upon expiration of the current contract.
79	Apply special education transportation costs for transporting students to proper budgetary codes. p. 347	Complete	\$0	\$0	\$0	The Accounting Department immediately distributed special education transportation costs to the proper budgetary accounts as soon as it was made aware of the problem.
80	Issue a directive that all Transportation personnel must report all overtime according to district policy and ensure that supervisors are monitoring compliance. p. 348	Complete	\$0	\$0	\$0	The director of Transportation issued a directive that personnel must obtain pre-approval to work overtime.
81	Centralize purchasing to one terminal and designate persons authorized to order and dispense parts. p. 352	Complete	\$150,822	\$0	\$0	The Purchasing Department now takes parts orders from both bus terminals. As such, the district eliminated

						duplication of effort, however, officials said they were not able to quantify savings.
82	Establish clearly defined guidelines for receiving, dispensing, ordering and entering parts into the system. p. 353	Complete	\$0	\$0	\$0	The director of Transportation established guidelines for receiving, dispensing, ordering and entering parts into the inventory system shortly after the review team left the district.
83	Provide ASE certification training for all FBISD mechanics. p. 354	Complete	\$0	\$0	\$0	In 2000-01, the district paid for ASE classes and materials for all mechanics. Beginning in 2001-02, the district will provide a \$300 stipend to mechanics for each level of ASE certification training completed. Upon completion of full certification, administrators may recommend mechanics for reclassification to master mechanic at a higher pay grade.
	Totals: Chapter 10		\$150,822	\$0	\$0	

Appendix A: Status of Recommendations and Savings
Chapter 11: Safety and Security

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five - Year Savings (Costs)	Actual Savings (Costs) to Date	FBISD's Projected Five - Year Savings (Costs)	Comments
84	Schedule monthly meetings of the director of administrative services, the chief of Police, the safe schools specialist, and community services officers to share information, coordinate programs, and establish priorities for the district's prevention and intervention programs. p. 362	Complete	\$0	\$0	\$0	The district's Discipline Review Team, comprised of the director of Administrative Services, the Chief of Police, the Community Relations Police Officer and the Safe Schools Specialist, meets once per month to share information, coordinate programs and establish district priorities for its prevention and intervention programs.
85	Establish a formal system to monitor and consistently apply the Discipline Management Plan. p. 365	Complete	\$0	\$0	\$0	FBISD drafted administrative procedures to monitor and apply the district's Discipline Management Plan fairly and consistently. The director of Administrative

						Services monitors the plan and the director of Information Technology prepares six-week reports and an annual summary of monthly reports for the board, the superintendent and area superintendents. The Discipline Review Team meets each six weeks to review the discipline report and school safety matters. The Discipline Management Council meets quarterly to review discipline issues and make recommendations to ensure an effective, efficient and equitable Discipline Management Plan.
86	Allocate campus-based police officers based upon an analysis of campus enrollment and historical incident data. p. 371	Complete	\$0	\$0	\$0	The district's Police Chief evaluates campus needs and historical data to allocate personnel, as appropriate.
	Totals: Chapter 11		\$0	\$0	\$0	

Appendix A: Status of Recommendations and Savings
Chapter 12: Computers and Technology

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	FBISD's Projected Five-Year Savings (Costs)	Comments
87	Develop an accurate student-to-computer ratio. p. 386	Complete	\$0	\$0	\$0	The district revised its student-to-computer ratio calculation to include only those computers that are "student touched." Additionally, the district counts only computers that are 250 MHz and above. The district plans to use the revised inventory as a baseline for future counts.
88	Revise the long-range technology plan to include measurable performance targets and implementation strategies that are linked to the budget. p. 388	In Progress	\$0	\$0	\$0	FBISD developed an E-Rate technology plan and received approval for it from the Texas Education Agency. The district also formed a Technology Committee that is reviewing and refining its E-Rate plan to make it more collaborative with district stakeholders.
89	Identify funding strategies to fully fund the district's long-range	Complete	\$1,950,000	\$3,500,000	\$5,500,000	The district's technology staff successfully identified. applied

	technology goals and dedicate money obtained through E-Rate and other grants to this end. p. 391					for and received several technology grants, including a one-year E-Rate grant, all valued at \$3.5 million to date. District staff members project they will identify and receive a minimum of \$1.9 million more funding over the next five years.
90	Enhance the Comprehensive Information Management System training to include the capabilities of specific modules in the system. p. 395	Complete	\$0	\$0	\$0	The district developed and now offers training courses that include the capabilities of specific modules in its Comprehensive Information Management System. District staff initiated this recommendation by forming a "super users" group and asking the group what it needed by way of training.
	Totals: Chapter 12		\$1,950,000	\$3,500,000	\$5,500,000	
	TOTAL SAVINGS		\$10,987,619	\$2,131,328	(\$1,050,710)	