

May 9, 2001

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

Fellow Texans:

I am pleased to present our Texas School Performance Review of the Fort Worth Independent School District (FWISD).

This review is intended to help FWISD hold the line on costs, streamline operations and improve services to ensure that more of every education dollar goes directly into the classroom, with the teacher and children, where it belongs. To aid in this task, I contracted with Gibson Consulting Group of Austin, Texas.

We have made a number of recommendations to improve FWISD's efficiency. We also have highlighted a number of "best practices" in district operations to share with other districts—model programs and services provided by the district's administrators, teachers and staff. This report outlines 136 detailed recommendations that could save FWISD more than \$23 million over the next five years, while reinvesting more than \$10 million to improve educational services and other operations. Net savings are estimated to reach more than \$13 million—savings that the district can redirect to the classroom.

We are grateful for the cooperation of FWISD's board, staff, parents and community members. We commend them for their dedication to improving the educational opportunities for our most precious resource in FWISD—our children.

I am also pleased to announce that the report is available on my Window on State Government Web site at
<http://www.window.state.tx.us/tspr/fortworth/>.

Sincerely,

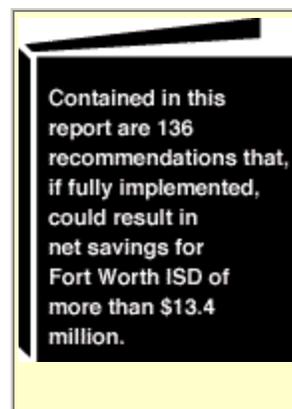


Carole Keeton Rylander
Texas Comptroller

Fort Worth Independent School District

When I took office in January 1999, I set new standards for school audits giving priority to districts with poor academic or financial performance and where the greatest number of students would benefit from an audit. Fort Worth ISD is the third largest school district in Texas with more than half of its students economically disadvantaged. It is facing both financial and academic challenges. That is what prompted me to select Fort Worth ISD for Texas School Performance Review (TSPR). The Fort Worth school board and superintendent all welcomed us with open arms and throughout the review have been an invaluable help.

The district has made significant gains in student performance in the last five years, however, student scores remain below state and regional averages and dropout rates are high. In addition, five schools/alternative programs in the district have recently been rated low performing—up from zero in 1998-99.



My TSPR team and I found that the district was being well managed and that in most areas the district was running in a cost-effective and efficient manner. Wherever possible, we looked for ways to help it operate more efficiently. The following recommendations for Fort Worth ISD will serve my goal of driving more of every education dollar directly into the classroom where it belongs. Contained in this report are 136 recommendations that, if fully implemented, could result in net savings for Fort Worth ISD of more than \$13.4 million.

We found two big money-saving recommendations. First, we found the district could save nearly \$3 million per year if it followed its own staffing formulas for everyone from campus administrators to custodians. Second, the use of

bus routing and tracking software could save the district almost \$4.3 million over the next five years. This money could then be redirected to address the district's five major challenges:

1. Lagging test scores, primarily in the middle schools;
2. High dropout rates;
3. Better documented procedures;
4. A need for comprehensive planning; and
5. Successful implementation and integration of technology.

The number one problem is student performance. Passing test scores on the Texas Assessment of Academic Skills (TAAS) are 12 points lower than the state average for grade school students and 25 points lower for middle school students. This is unacceptable. To address the lagging test scores, I am recommending that the district immediately create and follow a plan to make that difficult transition from grade school to middle school more seamless.

In addition, FWISD's dropout rate increased dramatically in 1998-99—rising to 4.3 percent from 2.5 percent in 1997-98—while most peer districts and the state and regional rates remained relatively stable. I recommend the district address this problem from two directions: (1) from the inside by creating an Office of Student Attendance and Dropout Initiatives and (2) from the outside by creating a Dropout Prevention/Reduction Task Force, including community, business, education and civic organizations. The entire community needs to be involved in helping these children be successful in school.

By addressing these issues, I believe Fort Worth could get back on track to making its district the best possible. I am confident that school board members, school administrators, teachers and parents are all committed to making the district the best it can be for their students.

A handwritten signature in black ink that reads "Carole Keeton Rylander". The signature is written in a cursive style with a prominent initial "C" and a long, sweeping tail on the "r" of "Rylander".

Carole Keeton Rylander, Texas Comptroller

Key Findings and Recommendations

During its seven-month review, TSPR examined Fort Worth ISD (FWISD) operations and heard from employees, school board members, teachers, students, parents, and community and business leaders. Following are the major proposals TSPR has developed to help the district address various issues:

Major Proposals

Lagging Test Scores, Particularly in the Middle Schools

- *Create an elementary to middle school transition plan.* FWISD's Texas Assessment of Academic Skills (TAAS) scores are lower than Region 11 and the state. Additionally, the district does not sustain elementary-level student performance on TAAS at the middle and secondary levels. For example, the percentage of students passing all TAAS tests taken in grades 3, 4, 5 and 6 is 7 to 12 percentage points lower than the percentage of students passing all TAAS tests taken in those same grades in the region and the state. The percentage of students passing all TAAS tests taken in grades 7, 8 and 10 is 15 to 25 percentage points lower than the region and the state. FWISD could improve student performance by creating a districtwide elementary to middle school plan to identify critical issues regarding an effective transition.
- *Increase the number of minorities and economically disadvantaged students taking advanced academic courses.* FWISD's percentage of minority and economically disadvantaged students completing advanced academic coursework or taking the Scholastic Aptitude Test (SAT) or the ACT Assessment college entrance exams remains lower than its peer districts, Region 11 and the state.

FWISD should develop strategies to increase the number and percentage of minority and economically disadvantaged students taking advanced academic courses and college entrance exams.

High Dropout Rates

- *Involve district personnel and community leaders to reduce the students' dropout rate.* While FWISD has pursued programs and initiatives to eliminate its dropout problem, dropout rates remain unacceptably high for all student groups and exceed the state and peer districts. FWISD's dropout rate increased in 1998-99 to 4.3 percent from 2.5 percent in 1997-98, while most peer districts and the state and regional rates remained relatively stable. The district should create an Office of Student Attendance and Dropout Initiatives to better coordinate its efforts, and create a Dropout Prevention/Reduction Task Force that includes community, business, education and civic organizations, to help it reduce the dropout rates.

Better Documented Procedures

- *Document and make emergency warning signals more consistent.* Schools do not use consistent emergency alarm procedures to identify common types of alerts such as tornadoes, bomb threats, hostage and shooting threats. The lack of consistency in alarm procedures among the campuses could lead to confusion in a crisis situation. Additionally, students who switch schools during the year and students graduating to the next level may be unfamiliar with the alarm procedures at their new school. Creating and documenting consistent districtwide warning signals will assist students and staff to know what to do during a crisis situation.
- *Accurately track the technology hardware inventory.* FWISD's hardware inventory is inaccurate. Of 78 inventoried items tested, 48, or 61 percent, could not be identified by location, description or functionality. Without an accurate inventory, the

district cannot identify missing or stolen items, locate those items or determine whether the items are usable. By conducting an annual physical count of hardware, the district can maintain an accurate inventory and be more accountable for taxpayers' assets.

- *Streamline and realign the district's travel operations.* The district's travel reimbursement and processing operations are ineffectively placed within the Purchasing Department, and the district uses a cumbersome travel request form to document reimbursable expenses. The result has been multiple and duplicative reviews of the forms by Purchasing and Accounting staff. Moreover, unprocessed forms are frequently returned to users because of errors. By realigning travel operations within the Accounting Department and by providing clear instructions for completing and processing the form, the district could reduce inefficiency in the system.
- *Follow existing staffing formulas.* FWISD does not consistently follow its own documented staffing formulas. Consequently, the district has approximately 95 more employees, at various levels, than are needed according to its own standard. By eliminating these positions through attrition, the district could save nearly \$3 million annually.

A Need for Comprehensive Planning

- *Use transportation routing and scheduling software.* While FWISD implemented new routing software for regular education routes for the start of the 2000-01 school year, the district did not adequately plan for the transition of information and data from the former system. Consequently, the district is not using the new system to identify regular routing and scheduling problems and solutions. The district also has not implemented the new system for special education routing and scheduling. By using the routing and scheduling software to plan and analyze regular and special education routes, FWISD could increase the efficiency and effectiveness of its

operations and save nearly \$4.3 million over five years.

- *Develop a districtwide safety and security plan.* The district does not have a comprehensive long-range safety and security planning process to provide a strategic direction for its Student Affairs Department, administrators, teachers, staff and Fort Worth police officers. The district developed its only safety and security related long-range plan in 1995 and used it to seek funding from the Fort Worth Crime Control and Prevention District (CCPD). No other long range-planning document exists to guide the district through the next five years. With a formal safety and security plan, the district will be able to avoid disagreements with its partnering organizations, identify gaps in service and more effectively use its resources.
- *Develop a facilities master plan and contract oversight procedures.* The district does not have a comprehensive long-range facilities master plan. Consequently, the district cannot plan beyond the scope of the present bond or look at strategies other than new facilities or modernizations. A long-range facilities plan can address these problems.
- *Start planning sooner and include more non-instructional areas in districtwide plans.* Although FWISD has district and campus level plans, its planning comes too late in the process to tie decisions to the budget. Non-instructional areas of district operations are not sufficiently addressed in any districtwide plan; and there are few ways for the district to monitor its progress toward goals in non-instructional areas. By changing the planning timeline so that most formal planning occurs before the budget is adopted and incorporating non-instructional functions into the planning process, the district will be better positioned to monitor progress toward goals and more directly link spending to district priorities.
- *Realign the district organization by function.* The district's organizational structure is not logically

aligned or grouped, which hampers the district's ability to effectively plan, budget and measure performance. By realigning the organization, FWISD could place related functions together at the department level, which would improve the district's planning efforts.

Successful implementation and integration of technology

- *Increase technology support.* FWISD does not have adequate resources dedicated to technology support. With only one support person for every 608 computers, the district falls far below the industry standards of between 1-to-100 and 1-to-200. By hiring new staff, the district will be able to provide better service to its customers and solve technology malfunctions more quickly. The five-year cost will be \$1.2 million.
- *Update the Technology Plan.* The district's technology plan for 1998-2003 has not been updated in two years and does not guide technology decisions. During the recent purchase of a new version of CIMS administrative software, the district did not address some key issues, such as the system's ability to automatically calculate annual salaries based on daily rates and the number of contract days. By updating its technology plan and adopting a clear and comprehensive acquisition process that addresses functionality, cost, training, conversion and implementation of new software, the district could avoid risky practices and coordinate technology needs throughout the district.

Exemplary Programs and Practices in the Fort Worth Independent School District

TSPR identified numerous best practices in the Fort Worth ISD (FWISD). Through commendations in each chapter, the report highlights model programs, operations and services provided by the district's administrators, teachers and staff. Other school districts throughout Texas are encouraged to examine these exemplary programs and services to see if they could be adapted to meet local needs.

- *Reconstituted low-performing schools*—FWISD reconstituted four of the lowest performing elementary schools in 1995 and subsequently four other campuses. Staff members on these reconstituted campuses use research-based instruction, health and social services, parental involvement, staff development and well-defined approaches to improve student conduct. One of the district's reconstituted schools earned an Exemplary rating for the 1999-2000 school year.
- *Energy management program*—FWISD developed an effective energy management program that has held down costs by more than \$1.5 million over the last two years. In May 1997, the district signed a performance contract that includes an energy accounting software program, employee training on using the software and general energy conservation training for the district's energy managers. The accounting software tracks energy consumption and makes adjustments to compensate for variations in weather, building additions and new construction, billing period lengths, additional technology and added new equipment.
- *Chairs for Teaching Excellence award program*—After receiving feedback from employee groups for the

need to infuse a new spirit of service, the district established the Chairs of Teaching Excellence award program. More than 80 businesses in Fort Worth sponsor an annual outstanding teacher recognition dinner where 11 teachers are awarded \$10,000 cash stipends.

- *In-house attorney*—FWISD's use of a staff attorney helps reduce the need for more expensive outside legal services. Consequently, the district's legal fees are only \$8.80 per student, compared to its peer districts that average \$15.85 per student in legal fees. Actual comparative data for 1999-2000 is not available yet, but FWISD's legal fees for outside counsel dropped by another \$23,000 last year.
- *Control employee health care premiums*—In spite of general increases in health care costs, FWISD's health care premiums compare favorably to those of its peer districts. In fact, the district offers lower premiums than the peer average for each coverage category while benefits are on par with the peer districts. To control the overall cost of health care, the district bids health insurance every three years and requires agency service agreements for brokers and agents placing district insurance coverage. The district also contracts directly with medical providers, which allows the district's input into the rate setting process.
- *Sound inventory controls protect assets*—FWISD's Central Warehouse controls inventories by maintaining lists of commodities and sharing these lists with the Accounting and Internal Audit departments. Consequently, FWISD's inventory variances due to theft, loss, receiving or distribution errors, or damage have been less than 1 percent annually since 1998.

What Is TSPR?

The Texas School Performance Review (TSPR), a program of the Texas Comptroller's office, is the nation's first state-level vehicle designed to improve the management and finances of public school districts.

Since its creation in 1991, TSPR has conducted in-depth, on-site management reviews of 46 Texas school districts serving more than 1 million students, or 28 percent of the state's 3.9 million public school students. More than \$491 million in five-year net savings have been identified in the previous 46 reviews conducted to date.

These reviews diagnose districts' administrative, organizational, and financial problems and recommend ways to cut costs, increase revenues, reduce overhead, streamline operations, and improve the delivery of educational services. TSPR's overall goal is to ensure that every possible education dollar is directed to the classroom.

A TSPR review is more than a traditional financial audit. Instead, TSPR examines the entire scope of district operations, including organization and management, educational service delivery, personnel management, community involvement, facilities use and management, financial management, asset and risk management, purchasing and warehousing functions, computers and technology, food services, transportation, and safety and security.

Reviews can be requested or districts can be selected for a review. A cross-section of Texas school districts—large and small, wealthy and poor, urban and rural—are selected so that a wide variety of other districts can apply TSPR's recommendations to their own circumstances. Priority is given to districts with a poor academic performance and/or a poor financial performance, and where the greatest number of students will benefit from an audit.

Nearly 90 percent of all recommendations are being

voluntarily implemented to date in the 31 districts that have had more than one year to implement TSPR recommendations.

EXECUTIVE SUMMARY

In September 20, 2000, Texas Comptroller Carole Keeton Rylander announced she had selected Fort Worth ISD (FWISD) for a school performance review. Work began in Fort Worth in October 2000. Based upon more than seven months of work, this report identifies FWISD's exemplary programs and suggests concrete ways to improve district operations. If fully implemented, the Comptroller's 136 recommendations could result in net savings of \$13.4 million over the next five years.

Improving the Texas School Performance Review

Soon after taking office in January 1999, Texas Comptroller Carole Keeton Rylander consulted school district officials, parents and teachers from across Texas and carefully examined past reviews and progress reports to make the Texas School Performance Review (TSPR) more valuable to the state's school districts. With the perspective of a former teacher and school board president, the Comptroller has vowed to use TSPR to increase local school districts' accountability to the communities they serve.

Recognizing that only 52 cents of every education dollar is spent on instruction, Comptroller Rylander's goal is to drive more of every education dollar directly into the classroom. Comptroller Rylander also has ordered TSPR staff to share best practices and exemplary programs quickly and systematically with all the state's school districts and with anyone else who requests such information. Comptroller Rylander has directed TSPR to serve as a clearinghouse of the best ideas in Texas public education.

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

- Ensure students and teachers receive the support and resources necessary to succeed;
- Identify innovative ways to address the district's core management challenges;
- Ensure administrative duties are performed efficiently, without duplication, and in a way that fosters education;
- Develop strategies to ensure the district's processes and programs are continuously assessed and improved;
- 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 a business in the Yellow Pages can do that job better and at a lower cost.

Finally, Comptroller Rylander has opened her door to Texans who share her optimism about the potential for public education. Suggestions to improve Texas schools or the school reviews are welcome at any time. The Comptroller believes public schools deserve all the attention and assistance they can get.

For more information, contact TSPR by calling toll-free 1-800-531-5441, extension 5-3676, or see the Comptroller's Website at www.window.state.tx.us.

TSPR in Fort Worth ISD

When contacted by the Comptroller during the summer of 2000, Superintendent Thomas Tocco and the Board of Trustees voiced their support for a performance review. On October 17, 2000, TSPR began its review.

The Comptroller contracted with Gibson Consulting Group, an Austin-based firm, at a cost of \$500,000 to assist with the review. The team interviewed district employees, school board members, parents, business leaders and community members and held 11 public forums at each district high school, on October 17, 18 and 19, 2000 respectively from 5:00 p.m. to 8:00 p.m. To obtain additional comments, the review team conducted 14 small focus group sessions with teachers, principals, employees students, parents and community members. The Comptroller's office also received letters and phone calls from a wide array of parents, teachers and community members.

A total of 1,467 respondents answered surveys. Two hundred forty-three campus and central administrators and support staff, 103 principals, 420 teachers and 51 students completed written surveys. Details from the surveys and public forums appear in **Appendices A** through **F**. In addition, TSPR conducted a random telephone survey of 650 area households. These survey results are in **Appendix B**.

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).

FWISD selected peer districts for comparisons based on similarities in student enrollment, student performance and community and student

demographics. The selected peer districts were Austin, Dallas, El Paso and Houston.

During its more than seven-month review, TSPR developed recommendations to improve operations and save taxpayers more than \$23 million by 2005-06. Cumulative net savings from all recommendations (savings minus recommended investments or expenditures) would reach \$13.4 million by 2005-06.

A detailed list of costs and savings by recommendation appears in **Exhibit 3**. Many TSPR recommendations would not have a direct financial impact but would improve the district's overall operations.

Acknowledgments

The Comptroller's office and Gibson Consulting Group wish to express their appreciation to the FWISD Board of Trustees, Superintendent Thomas Tocco, district employees, students, parents and community residents who helped during the review. Special thanks go to Nancy Ricker, executive director for School and Community Relations, and Steve Fortenberry, chief financial officer, who jointly served as FWISD's liaisons to the review team. They arranged for office space, equipment and meeting rooms, organized meetings, responded to requests and accommodated the review team's needs.

Fort Worth ISD

FWISD is the third largest school district in the state. The district serves a culturally diverse population of nearly 79,000 students in 120 schools: 73 elementary schools, 24 middle schools, 13 high schools and 10 special and/or alternative education schools. FWISD's student profile is 22.8 percent Anglo, 43 percent Hispanic, 31.7 percent African American, 2.3 percent Asian Pacific Islander and 0.2 percent Native American. Economically disadvantaged students make up 58 percent of the district's student population. **Exhibit 1** details the demographic characteristics of the FWISD and its peer school districts.

**Exhibit 1
Demographic Characteristics of FWISD
and Peer School Districts
1999-2000**

		Racial/Ethnic Percentage				
District	Student Enrollment	Percent Hispanic	Percent African-	Percent Anglo	Percent Other	Percent Economicallv

			American			Disadvantaged
Austin	77,723	45.8%	16.7%	34.8%	2.8%	46.8%
Dallas	160,477	52.0%	37.6%	8.5%	1.9%	73.4%
El Paso	62,306	77.3%	4.8%	16.5%	1.5%	66.3%
Houston	209,716	54.1%	33.0%	10.0%	2.9%	75.4%
Fort Worth	78,654	43.0%	31.7%	22.8%	2.5%	58.0%
Region 11	402,161	19.9%	12.8%	63.5%	3.7%	32.3%
State	3,991,783	39.6%	14.4%	43.1%	2.9%	49.0%

Source: 1999-2000 Academic Excellence Indicator System (AEIS).

FWISD is the ninth fastest growing, big city school district in the United States, adding an average of more than 1,000 new students each year since 1995-96. FWISD served 78,654 students during 1999-2000, an increase from the 1998-99 enrollment of 0.9 percent (**Exhibit 2**). District officials expect enrollment to increase to 94,469, or by 20 percent by 2006-07.

Exhibit 2
FWISD Student Enrollment History

School Year	Actual Student Enrollment	Percent Change
1995-1996	74,021	
1996-1997	75,813	2.4%
1997-1998	76,901	1.4%
1998-1999	77,956	1.4%
1999-2000	78,654	0.9%

Source: Texas Education Agency Multi-year AEIS reports.

In 1999-2000, FWISD's property value reached \$166,169 per student, compared to the state average of \$198,090 and a regional average of \$227,547 per student. The district's 2000-2001 tax rate is \$1.64 (\$1.45 maintenance and operations plus \$0.19 debt service).

The district's annual budget is \$508.9 million for 2000-01, an increase of 15 percent over the 1999-2000 budget of \$443.4 million.

FWISD's 1999-2000 TAAS passing rate was 70.4 percent compared to the state average of 79.9 percent and the regional average of 82.9 percent. The 1999-2000 passing rate improved over the 1998-99 passing rate of 66.9 percent. The number of low-performing schools, however, increased from zero to five during the same period.

The district enjoys a small-town "feel" despite its size. Superintendent Thomas Tocco has been in the district for nearly seven years, and the board has long-tenured members. Board president, Gary Manny, has served as a board member since 1986 and as board president since 1988. The board and superintendent enjoy a healthy and professional relationship built on trust and open communication and are focused on instruction and student performance.

Overall, the review team found that FWISD focuses on improving student performance and holding the line on costs. Over the past four years, FWISD has improved its TAAS scores at a significantly higher rate than all of its peer districts. While averages are still below state and regional averages, and remain a top concern, district management has demonstrated the ability to identify and address specific educational deficiencies through several innovative programs and initiatives. The district reconstituted four of its lowest performing elementary schools in 1995 and subsequently four other campuses to improve student performance. In 1999-2000, the rates of improvement for the reconstituted schools ranged from 30.7 percentage points to 79.7 percentage points.

The district uses several strategies to control costs. FWISD bids health insurance every three years, requires service agreements for brokers and agents placing district insurance coverage and contracts directly with medical providers, which allows the district's input into the rate setting process. These strategies have permitted the district to manage health plan costs successfully, while offering comprehensive health care benefits to its employees. The district also employs an in-house attorney, and it contracts with an external investment portfolio manager. A staff attorney helps reduce the need for more expensive outside legal services, and the external investment manager allows the district to manage its cash flow in a cost effective manner with less staff.

As FWISD works to improve its services to the children of Fort Worth, the district is facing five major challenges:

- lagging test scores, particularly at the middle school level;
- high dropout rates;

- a need for comprehensive planning;
- better documented procedures; and
- successful implementation and integration of technology.

FWISD's TAAS scores are lower than Region 11 and the state. In 1999-2000, the percentage of elementary students passing all TAAS tests taken was 7 to 12 percentage points below Region 11 and the state. By grades 7, 8 and 10, the percentage of students passing all TAAS tests widened to 15 to 25 percentage points below the region and the state.

The district has pursued programs and initiatives to eliminate its dropout problem, but the dropout rates remain unacceptably high for all student groups and exceeds the state and peer district rates. FWISD's dropout rate increased in 1998-99 to 4.3 percent from 2.5 percent in 1997-98, while most peer districts and the state and regional rates remained relatively stable.

A need for comprehensive planning is evident in several non-instructional areas. For example, the district does not have a long-range facilities master plan, despite the fact that it averages more than 1,000 new students per year. The district's technology plan for 1998-2003 has not been updated in two years; nor is there a comprehensive long-range safety and security planning process.

Because of Y2K, the district was rushed in its selection of software, and did not follow standard methodologies for defining requirements. Insufficient project planning and project management have adversely affected the implementation and integration of technology in the district. User expectations continue to be unmet, and the district has not determined how technologies will affect operating efficiency and the organization of the central office and schools.

Key Findings and Recommendations

- ***Realign the district organization by function.*** The district's organizational structure is not logically aligned or grouped, which hampers the district's ability to plan, budget and measure performance. Realigning the organization and placing similar or related functions together at the department level, would improve the district's planning efforts.
- ***Start planning sooner and include more non-instructional areas in districtwide plans.*** Although FWISD has district and campus level plans, its planning comes too late in the process to tie decisions to the budget. Non-instructional areas of district operations are not sufficiently addressed in any districtwide plan,

and there are few ways for the district to monitor its progress toward goals in non-instructional areas. By changing the planning timeline so that most formal planning occurs before the budget is adopted and incorporating non-instructional functions into the planning process, the district will be better positioned to monitor progress toward its goals and more directly link spending to district priorities.

- ***Create an elementary to middle school transition initiative.***
FWISD's Texas Assessment of Academic Skills (TAAS) scores are lower than Region 11 and the state. Moreover, the district does not sustain elementary-level student performance on TAAS at the middle and secondary levels. For example, the percentage of students passing all TAAS tests taken in grades 3, 4, 5 and 6 is 7 to 12 percentage points lower than the percentage of students passing all TAAS tests taken in those same grades in the region and the state. The percentage of students passing all TAAS tests taken in grades 7, 8 and 10, however, is 15 to 25 percentage points lower than the region and the state. FWISD could improve student performance by creating a districtwide elementary to middle school initiative to identify critical issues in need of effective transition activities.
- ***Reduce the dropout rate for all students.*** While FWISD has pursued programs and initiatives to eliminate its dropout problem, dropout rates remain unacceptably high for all student groups and exceeds the state and peer districts. FWISD's dropout rate increased in 1998-99 to 4.3 percent from 2.5 percent in 1997-98, while most peer districts and the state and regional rates remained relatively stable. The district should create an Office of Student Attendance and Dropout Initiatives to better coordinate its efforts, and create a Dropout Prevention/Reduction Task Force, including community, business, education and civic organizations, to help it reduce the dropout rates.
- ***Increase the number of minorities and economically disadvantaged students taking advanced academic courses.***
FWISD's percentage of minority and economically disadvantaged students completing advanced academic coursework or taking the Scholastic Aptitude Test or the ACT Assessment college entrance examinations remains lower than its peer districts, Region 11 and the state. FWISD should develop strategies to increase the number and percentage of minority and economically disadvantaged students taking advanced academic courses and college entrance examinations.

- ***Combine federal and state compensatory education programs.*** FWISD does not coordinate state and federal programs for at-risk students. The director of Federal Compensatory Education does not control state compensatory education funds, and it is unclear how decisions are made about distributing state funds for district initiatives. By combining federal and state compensatory education functions and coordinating distribution of the funds, the district could better provide effective programs and ensure compliance with state and federal law.
- ***Establish Human Resources performance measures.*** FWISD's Human Resources Department compiles little data on employee turnover rates, absenteeism, recruiting successes, human resource response time, the average time to fill vacancies and other measures critical to the department's success. By establishing performance measures and developing reports to measure the department's success against these measures, the district could accurately track the department's performance and take corrective steps when needed.
- ***Institute a pay-for-performance system.*** While its compensation philosophy states the department will, "encourage outstanding individual and team performance," with the exception of the Chairs for Teaching Excellence program that rewards a small number of teachers each year, FWISD does not financially reward exceptional employee performance. Salary increases in FWISD are given to an entire group of employees, so employees receive the same salary increases as their peers, regardless of how well they are individually performing. A pay-for-performance system would send a clear message to employees that the district truly values individual achievement.
- ***Develop a facilities master plan.*** The district does not have a comprehensive long-range facilities master plan. Consequently, the district cannot plan beyond the scope of the present bond or look at strategies other than new facilities or modernizations. A long-range facilities plan can address these problems.
- ***Follow existing staffing formulas.*** FWISD does not consistently follow its own documented staffing formulas. Consequently, the district has approximately 95 more employees, at various levels, than are needed according to its own standard. By eliminating these positions through attrition, the district could save \$3 million annually.

- ***Implement a safety program to control workers' compensation costs.*** FWISD lacks a districtwide safety program and limits safety training to support staff such as food service workers and bus drivers. Some evidence shows professional staff may have more accidents. Consequently, program costs are high. By implementing a districtwide safety initiative, the district could save about \$1.9 million over five years.
- ***Require comprehensive final budget amendments and provide budget training.*** FWISD overspent its budget at the functional level by more than \$1 million for two of the last four years without board approval, which violates state law. The district upgraded the financial management system to allow users to query and print their own reports, yet some department heads and campus principals do not know how to run their own budget reports. By requiring timely budget amendments and more training, the district can control costs and ensure compliance with state law.
- ***Strengthen the district's Internal Audit Department.*** FWISD's internal auditors spend time auditing operations that involve relatively small dollar amounts, which leaves other higher risk activities unaudited. Although these funds make up less than 1 percent of the district's total funds, 78 percent of the Internal Audit Department's workload relates to auditing or investigating student activity funds, and training or other operational functions. By conducting a regular risk assessment of the district's organization and operations, programs, systems and controls, the district can determine which activities or functions it should audit, and how much time it should devote to each. In addition, the Internal Audit Department will have greater independence and will not act as merely a function of the Accounting Department if the department reports directly to the board rather than the chief financial officer.
- ***Enforce purchasing procedures.*** FWISD's schools and departments often buy items before entering purchase orders into the system. In addition, Purchasing Department employees manually track the district's aggregate purchasing levels. Both practices contribute to over-budget spending and could result in violation of purchasing laws. By developing a system, complete with punitive measures for noncompliance, to regularly monitor purchasing procedures, and by establishing a reliable system to track and monitor purchases, the district could better control costs and ensure it complies with purchasing laws.
- ***Streamline and realign the district's travel operations.*** The district's travel reimbursement and processing operations are

ineffectively placed within the Purchasing Department, and the district uses a cumbersome travel request form that does not contain clear instructions. The result has been multiple and duplicative reviews of the forms by Purchasing and Accounting staff. Moreover, unprocessed forms are frequently returned to users because of errors. By realigning travel operations within the Accounting Department and by providing clear instructions for completing and processing the form, the district could reduce inefficiency in the system.

- ***Increase technology support.*** FWISD does not have adequate resources dedicated to technology support. With only one support person for every 608 computers, the district falls far below the industry standards of between 1-to-100 and 1-to-200. By hiring 5 new staff, the district will be able to provide better service to its customers and solve technology malfunctions more quickly. The five-year cost will be \$1.2 million.
- ***Update the Technology Plan.*** The district's technology plan for 1998-2003 has not been updated in two years and does not guide technology decisions. During the recent purchase of a new version of CIMS administrative software, the district did not address some key issues, such as the system's ability to automatically calculate annual salaries based on daily rates and the number of contract days. By updating its technology plan and adopting a clear and comprehensive acquisition process that addresses functionality, cost, training, conversion and implementation of new software, the district could avoid risky practices and coordinate technology needs throughout the district.
- ***Accurately track the technology hardware inventory.*** FWISD's hardware inventory is inaccurate. Of 78 inventoried items tested at one school, 48, or 61 percent, were listed improperly. Without an accurate inventory, the district cannot identify missing or stolen items, locate those items or determine whether the items are usable. By conducting an annual physical count of hardware, the district can maintain an accurate inventory and be more accountable for taxpayers' assets.
- ***Use the transportation routing and scheduling software.*** While FWISD implemented a new routing software for regular education routes for the start of the 2000-01 school year, the district did not adequately plan for the transition of information and data from the former system. Consequently, the district is not using the new system to identify regular routing and scheduling problems and solutions. The district also has not implemented the new system for

special education routing and scheduling. By using the routing and scheduling software to plan and analyze regular and special education routes, FWISD could increase the efficiency and effectiveness of its operations and save nearly \$4.3 million over five years.

- ***Develop a districtwide safety and security plan.*** The district does not have a comprehensive long-range safety and security planning process to provide a strategic direction for its Student Affairs Department, administrators, teachers, staff and Fort Worth police officers. The district developed its only safety and security related long-range plan in 1995 and used it to seek funding from the Fort Worth Crime Control and Prevention District (CCPD). No other long range-planning document exists to guide the district through the next five years. With a formal safety and security plan, the district will be able to avoid disagreements with its partnering organizations, identify gaps in service and more effectively use its resources.
- ***Make emergency warning signals more consistent.*** Schools do not use consistent emergency alarm procedures to identify common types of alerts such as tornadoes, bomb threats, hostage and shooting threats. The lack of consistency in alarm procedures among the campuses could lead to confusion in a crisis situation. Additionally, students who switch schools during the year and students graduating to the next level may be unfamiliar with the alarm procedures at their new school. Consistent districtwide warning signals will assist students and staff to know instinctively what to do during a crisis situation.

Exemplary Programs and Practices

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

- ***Reconstituting low-performing schools has improved student performance.*** FWISD reconstituted four of the lowest performing elementary schools in 1995 and subsequently expanded this process to four other campuses. Staff members on these reconstituted campuses use research-based instruction, health and social services, parental involvement, staff development and well-defined approaches to improve student conduct. One of the

district's reconstituted schools earned an Exemplary rating from TEA for the 1999-2000 school year; four schools earned Recognized ratings; and three schools earned Acceptable ratings. The rates of improvement for the reconstituted schools ranged from 30.7 percentage points to 79.7 percentage points.

- ***In-house attorney controls legal costs.*** FWISD's use of a staff attorney helps reduce the need for more expensive outside legal services. The in-house attorney provides direct legal support and advice to administrators and school personnel, and coordinates and monitors services provided by outside legal counsel. Consequently, the district's legal fees of \$8.80 per student in 1998-99 compare favorably to its peer districts, which average \$15.85 per student in legal fees. Actual comparative data for 1999-2000 is not available yet, but FWISD's legal fees for outside counsel dropped by another \$23,000 last year.
- ***Strategies control employee health care premiums.*** In spite of general increases in health care costs, FWISD offers lower premiums than the peer average for each coverage category while benefits are on a par with the peer districts. To control the overall cost of health care, the district bids health insurance every three years and requires agency service agreements for brokers and agents placing district insurance coverage. The district also contracts directly with medical providers, which allows the district's input into the rate setting process. These strategies have allowed the district to successfully manage health plan costs, while offering comprehensive health care benefits to its employees.
- ***External investment advisor reduces costs.*** FWISD uses an external investment advisor to manage its investment portfolio. This practice allows the district to manage its cash flow in a cost effective manner with less staff than peer districts. In 1999-2000, the district paid approximately \$84,000 for this service, which is based upon a fee of 0.15 percent of the total monthly balances. Peers employed from one to four additional employees for this purpose.
- ***Sound inventory controls protect assets.*** FWISD's Central Warehouse controls inventories by maintaining lists of commodities by number, description and scheduled date of inventory counts. The warehouse shares the list with the Accounting and Internal Audit departments so staff in those departments can observe the counts. Consequently, FWISD's inventory variances due to theft, loss, receiving or distribution

errors or damage have been less than 1 percent annually since 1998.

- ***Competitive bidding, testing and evaluation hold custodial supplies costs down.*** FWISD bids custodial supplies and equipment annually and tests all items for efficiency and effectiveness. As a result, the district's actual 1999-2000 custodial supply costs were approximately \$7 per student, significantly lower than the spring 1999 *American School and University* study's suggested costs of between \$8 to \$10 per student.
- ***Energy management program contains costs.*** FWISD developed an effective energy management program that has held down costs by more than \$1.5 million over the last two years. In May 1997, the district signed a performance contract that included an energy accounting software program, employee training on using the software and general energy conservation training for the district's energy managers. The accounting software tracks energy consumption and makes adjustments to compensate for variations in weather, building additions and new construction, billing period lengths, additional technology and added new equipment. These adjustments allow the district to make an "apples to apples" comparison of the current year's energy use to the base year.
- ***Chairs for Teaching Excellence program recognizes and rewards outstanding teacher performance.*** After receiving feedback from employee groups about the need to infuse a new spirit of service in the district, FWISD established the Chairs of Teaching Excellence award program. More than 80 businesses in Fort Worth sponsor an annual outstanding teacher recognition dinner that awards 11 teachers \$10,000 cash stipends. Deserving teachers are recognized, and others are encouraged to excel.

Savings and Investment Requirements

Many TSPR's recommendations would result in savings and increased revenue that could be used to improve classroom instruction. The savings identified in this report are conservative and should be considered minimums. Proposed investments of additional funds usually are related to increased efficiencies or savings or improved productivity and effectiveness.

TSPR recommended 136 ways to save FWISD more than \$23 million in gross savings over a five-year period. Reinvestment opportunities will cost the district \$10.4 million during the same period. Full implementation of

all recommendations in this report could produce net savings of \$13.4 million by 2005-06.

Exhibit 3
Summary of Net Savings
TSPR Review of Fort Worth Independent School District

Year	Total
2001-02 Initial Annual Net Savings	\$1,066,220
2002-03 Additional Annual Net Savings	\$2,493,830
2003-04 Additional Annual Net Savings	\$3,383,606
2004-05 Additional Annual Net Savings	\$3,383,606
2005-06 Additional Annual Net Savings	\$3,383,606
One Time Net (Costs)/Savings	(\$321,285)
TOTAL SAVINGS PROJECTED FOR 2001-2006	\$13,389,583

A detailed list of costs and savings by recommendation appears in **Exhibit 3**. The page number for each recommendation is listed in the summary chart for reference purposes. Detailed implementation strategies, timelines and the estimates of fiscal impact follow each recommendation in this report. The implementation section associated with each recommendation highlights the actions necessary to achieve the proposed results. Some items should be implemented immediately, some over the next year or two and some over several years.

TSPR recommends the FWISD board ask district administrators to review the recommendations, develop an implementation plan and monitor its progress. As always, TSPR staff is available to help implement proposals.

EXECUTIVE SUMMARY

Exhibit 3 Summary of Costs and Savings by Recommendation Part 1 (Chapters 1-6)

	Recommendation	2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	5-Year (Costs) or Savings	One Time (Costs) or Savings
Chapter 1 District Organization and Management								
1	Formalize assignment and responsibilities of board committees. p. 30	\$0	\$0	\$0	\$0	\$0	\$0	\$0
2	Approve board minutes no later than one month after the date of the meeting. p. 31	\$0	\$0	\$0	\$0	\$0	\$0	\$0
3	Start board meetings on time, use timed agendas and reduce the length of board meetings. p. 32	\$0	\$0	\$0	\$0	\$0	\$0	\$0
4	Track board member training hours to ensure compliance with state requirements for continuing education. p. 34	\$0	\$0	\$0	\$0	\$0	\$0	\$0
5	Provide orientation for new board members. p. 35	\$0	\$0	\$0	\$0	\$0	\$0	\$0
6	Automate the policy manual and immediately update policy changes. p. 36	\$9,110	\$9,110	\$9,110	\$9,110	\$9,110	\$45,550	\$0
7	Create a full-time policy and procedures coordinator position and begin the documentation of procedures. p. 38	(\$30,084)	(\$30,084)	(\$30,084)	(\$30,084)	(\$30,084)	(\$150,420)	\$0
8	Realign the organizational structure to reflect a logical alignment of functions that can be linked to the planning and budgeting process. p. 44	\$0	\$0	\$0	\$0	\$0	\$0	\$0
9	Apply existing elementary formulas to determine appropriate staffing levels for schools. p. 49	\$282,520	\$621,544	\$621,544	\$621,544	\$621,544	\$2,768,696	\$0
10	Start the planning process in December of each school year to allow sufficient planning time for the next year's budget. p. 52	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$20,000)	\$0

11	Expand the scope of the Strategic Plan and District Educational Improvement Plan to include more non-instructional areas. p. 57	\$0	\$0	\$0	\$0	\$0	\$0	\$0
12	Develop additional performance measures to evaluate the district's performance, particularly for non-instructional areas. p. 59	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Chapter 1 Total	\$257,546	\$596,570	\$596,570	\$596,570	\$596,570	\$2,643,826	\$0
Chapter 2 Education Service Delivery								
13	Establish a districtwide elementary and middle school initiative that identifies and addresses critical issues regarding effective transitions. p. 81	\$0	\$0	\$0	\$0	\$0	\$0	\$0
14	Encourage ethnic minority and economically disadvantaged students to take and pass advanced academic courses and college entrance examinations. p. 85	\$0	\$0	\$0	\$0	\$0	\$0	\$0
15	Implement plans to reduce TAAS exemption rates for all students. p. 87	\$0	\$0	\$0	\$0	\$0	\$0	\$0
16	Develop strategies that prepare students to pass the end-of-course examinations. p. 90	\$0	\$0	\$0	\$0	\$0	\$0	\$0
17	Incorporate instruction that addresses the needs of limited English proficient upper elementary and middle school students in the district's existing reading initiative. p. 97	\$0	\$0	\$0	\$0	\$0	\$0	\$0
18	Create an Office of Student Attendance and Dropout Initiatives and hire a director. p. 104	(\$75,388)	(\$75,388)	(\$75,388)	(\$75,388)	(\$75,388)	(\$376,940)	\$0
19	Create a Dropout Prevention/Reduction Task Force including community, business, education and civic organizations. p. 106	\$0	\$0	\$0	\$0	\$0	\$0	\$0
20	Assign non-counseling duties currently performed by counselors to other school or district personnel. p. 109	\$0	\$0	\$0	\$0	\$0	\$0	\$0
21	Combine the budgeting and planning functions for federal (Title I, Part A) and state compensatory education in one office under the associate superintendent of Instruction. p. 114	\$0	\$0	\$0	\$0	\$0	\$0	\$0
22	Incorporate a review of compensatory	\$0	\$0	\$0	\$0	\$0	\$0	\$0

	education programs within the Planning and Monitoring function of the district's Quality Review Team responsibilities. p. 116							
23	Create monthly special education SASIxp reports by school, teacher and student that include specific disabilities of students to ensure adequate planning and staffing of FWISD Special Education programs. p. 124	\$0	\$0	\$0	\$0	\$0	\$0	\$0
24	Automate Special Education data entry, reporting and Medicaid billing. p. 126	\$0	\$0	\$0	\$0	\$0	\$0	\$0
25	Modify the district's process for PEIMS reporting of bilingual/ESL staff and include staffing and certification information in the district's annual program evaluation report. p. 133	\$0	\$0	\$0	\$0	\$0	\$0	\$0
26	Analyze data and evaluate the Career and Technology Education programs to identify ways to maximize program effectiveness. p. 138	\$0	\$0	\$0	\$0	\$0	\$0	\$0
27	Evaluate the services provided, students served, collaboration between FWISD and sponsoring agencies as well as the costs of running school-based health clinics. p. 142	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Chapter 2 Total	(\$75,388)	(\$75,388)	(\$75,388)	(\$75,388)	(\$75,388)	(\$376,940)	\$0
Chapter 3 Community Involvement								
28	Reclassify secretarial position in School and Community Partnerships from pay grade 4 to pay grade 5. p. 154	(\$2,161)	(\$2,161)	(\$2,161)	(\$2,161)	(\$2,161)	(\$10,805)	\$0
	Chapter 3 Total	(\$2,161)	(\$2,161)	(\$2,161)	(\$2,161)	(\$2,161)	(\$10,805)	\$0
Chapter 4 Personnel Management								
29	Increase professional requirements for Human Resource Department administrators. p. 179	\$0	\$0	\$0	\$0	\$0	\$0	\$0
30	Define specific objectives and dates for the Human Resources strategic plan and begin producing status reports. p. 181	\$0	\$0	\$0	\$0	\$0	\$0	\$0
31	Streamline job description maintenance. and update job	\$0	(\$2,000)	(\$2,000)	(\$2,000)	(\$2,000)	(\$8,000)	(\$25,000)

	descriptions at least every three years. p. 183							
32	Develop performance measures and standard reports for the Human Resources Department. p. 184	\$0	\$0	\$0	\$0	\$0	\$0	\$0
33	Develop a procedures manual for the Human Resources Department. p. 186	\$0	\$0	\$0	\$0	\$0	\$0	\$0
34	Institute a pay-for-performance system to reward exceptional performance. p. 194	\$0	\$0	\$0	\$0	\$0	\$0	\$0
35	Evaluate the cost of all procedural and policy changes . p. 195	\$0	\$0	\$0	\$0	\$0	\$0	\$0
36	Include policies for promotions and seniority in the policy manual, and ensure that non-professional positions receive sufficient coverage. p. 196	\$0	\$0	\$0	\$0	\$0	\$0	\$0
37	Establish written policies on moonlighting payroll and monitor the time and money spent processing moon-lighting pay. p. 197	\$0	\$0	\$0	\$0	\$0	\$0	\$0
38	Implement a policy to eliminate positions not filled within nine months. p. 201	\$0	\$0	\$0	\$0	\$0	\$0	\$0
39	Reduce the length of vacancies by shortening the hiring cycle and conducting staff planning. p. 202	\$0	\$0	\$0	\$0	\$0	\$0	\$0
40	Track the effectiveness of individual recruiting initiatives. p. 203	\$0	\$0	\$0	\$0	\$0	\$0	\$0
41	Administer tests as part of the initial employment screening process. p. 204	\$0	\$0	\$0	\$0	\$0	\$0	\$0
42	Issue contracts only for positions requiring certification or permits. p. 207	\$0	\$0	\$0	\$0	\$0	\$0	\$0
43	Standardize format and common elements for performance appraisals of non-teaching staff. p. 209	\$0	\$0	\$0	\$0	\$0	\$0	\$0
44	Provide mini-conferences to non-instructional supervisory personnel. p. 212	(\$5,000)	(\$5,000)	(\$5,000)	(\$5,000)	(\$5,000)	(\$25,000)	\$0
	Chapter 4 Total	(\$5,000)	(\$7,000)	(\$7,000)	(\$7,000)	(\$7,000)	(\$33,000)	(\$25,000)
Chapter 5 Facilities Use and Management								
45	Develop a comprehensive long-range facilities master plan and update annually. p. 233	\$0	\$0	\$0	\$0	\$0	\$0	(\$25,000)

57	Implement district policies regulating temperature controls and energy management software on a districtwide basis. p. 261	\$0	\$0	\$0	\$0	\$0	\$0	\$0
58	Involve the energy management group in HVAC system selection. p. 262	\$0	\$0	\$0	\$0	\$0	\$0	\$0
59	Evaluate the programs offered by SECO, and participate in the programs beneficial to the district. p. 263	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Chapter 5 Total		\$654,708	\$1,518,187	\$2,270,463	\$2,270,463	\$2,270,463	\$8,984,284	(\$90,000)
Chapter 6 Asset and Risk Management								
60	Perform annual internal audits of investment activities and quarterly reports. p. 274	\$0	\$0	\$0	\$0	\$0	\$0	\$0
61	Develop investment procedures that include a discussion of the control activities necessary to ensure that management's objectives for safeguarding district investments are met. p. 275	\$0	\$0	\$0	\$0	\$0	\$0	\$0
62	Establish a task force to initiate a program to reduce workers' compensation program costs. p. 285	\$210,115	\$420,231	\$420,231	\$420,231	\$420,231	\$1,891,039	\$0
63	Establish post-offer, pre-employment screening as a means of reducing workers' compensation claims and costs. p. 287	\$54,909	\$109,818	\$109,818	\$109,818	\$109,818	\$494,181	\$0
64	Develop a districtwide safety manual and update annually. p. 288	(\$1,000)	(\$1,000)	(\$1,000)	(\$1,000)	(\$1,000)	(\$5,000)	\$0
65	Raise the fixed assets capitalization threshold to \$5,000 for assets accounted for in the Fixed-Asset Group of Accounts. p. 290	\$0	\$0	\$0	\$0	\$0	\$0	\$0
66	Modify the current inventory update process to more effectively use the automated system to update the fixed assets inventory. p. 292	\$0	\$0	\$0	\$0	\$0	\$0	\$0
67	Modify the physical inventory process to increase accuracy and timeliness of information. p. 293	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Chapter 6 Total		\$264,024	\$529,049	\$529,049	\$529,049	\$529,049	\$2,380,220	\$0

74	Eliminate the excessive review of the internal finance funds bank statement by the Accounting Department and submit to schools within two days of receipt. p. 325	\$0	\$0	\$0	\$0	\$0	\$0	\$0
75	Amend check-signing policies to streamline the disbursement process for internal finance funds. p. 327	\$0	\$0	\$0	\$0	\$0	\$0	\$0
76	Transfer the operational responsibilities of the Internal Audit Department to the Accounting Department to maintain the independence and objectivity of the audit function. p. 331	\$0	\$0	\$0	\$0	\$0	\$0	\$0
77	Create a board Audit Advisory Committee to advise the board in matters pertaining to the district's internal and external audit functions. p. 332	\$0	\$0	\$0	\$0	\$0	\$0	\$0
78	Restructure the Internal Audit Department to report directly to the board. p. 333	\$0	\$0	\$0	\$0	\$0	\$0	\$0
79	Adopt a charter for the Internal Audit Department that details the department's purpose, authority and responsibility. p. 334	\$0	\$0	\$0	\$0	\$0	\$0	\$0
80	Conduct an annual risk assessment to determine annual audit objectives and allocate audit hours accordingly. p. 335	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Chapter 7 Total		\$29,000	\$29,000	\$29,000	\$29,000	\$29,000	\$145,000	(\$146,425)
Chapter 8 Purchasing and Warehouse Management								
81	Develop a process for	\$0	\$0	\$0	\$0	\$0	\$0	\$0

	monitoring purchasing procedures and enforcing the district's purchasing policies. p. 344							
82	Move the travel review process to the Accounting Department. p. 345	\$0	\$0	\$0	\$0	\$0	\$0	\$0
83	Develop written procedures for district travel and provide training for employees. p. 346	\$0	\$0	\$0	\$0	\$0	\$0	\$0
84	Require departmental staff to process travel forms through the CIMS III travel system. p. 348	\$26,446	\$26,446	\$26,446	\$26,446	\$26,446	\$132,230	\$0
85	Actively participate in the Texas Cooperative Purchasing Network. p. 350	\$0	\$0	\$0	\$0	\$0	\$0	\$0
86	Establish a commodity code system and monitor purchases to ensure compliance with Texas purchasing laws. p. 351	\$0	\$0	\$0	\$0	\$0	\$0	\$0
87	Reduce the amount of office supplies stored in the Central Warehouse and maximize use of the just-in-time contract for supplies. p. 356	\$0	\$0	\$0	\$0	\$0	\$0	\$0
88	Prepare a vehicle replacement schedule and budget for regular vehicle replacement. p. 357	(\$50,000)	(\$50,000)	(\$25,000)	(\$25,000)	(\$25,000)	(\$175,000)	\$0
89	Enforce district policy to require schools to reimburse the district for missing textbooks. p. 363	\$130,117	\$130,117	\$130,117	\$130,117	\$130,117	\$650,585	\$0
	Chapter 8 Total	\$106,563	\$106,563	\$131,563	\$131,563	\$131,563	\$607,815	\$0

Chapter 9 Computers and Technology

90	Increase ITS support staff by five positions. p. 375	(\$241,976)	(\$241,976)	(\$241,976)	(\$241,976)	(\$241,976)	(\$1,209,880)	\$0
91	Track all technology work orders and response times to improve department efficiency and effectiveness. p. 376	\$0	\$0	\$0	\$0	\$0	\$0	\$0
92	Develop and implement a formal methodology for the selection, implementation and integration of all technologies based on the best practices of other districts. p. 382	\$0	\$0	\$0	\$0	\$0	\$0	\$0
93	Update the District Technology Plan on an annual basis. p. 384	\$0	\$0	\$0	\$0	\$0	\$0	\$0
94	Pursue alternative funding sources for technology expenditures. p. 385	\$0	\$112,500	\$225,000	\$225,000	\$225,000	\$787,500	\$0
95	Finalize and implement the Disaster Recovery Plan. p. 386	\$0	\$0	\$0	\$0	\$0	\$0	\$0
96	Develop and implement nightly back-up procedures for servers, and document back-up procedures for the AS/400. p. 387	\$0	\$0	\$0	\$0	\$0	\$0	\$0
97	Allocate instructional computers to schools based on desired student-to-computer ratios. p. 390	\$0	\$0	\$0	\$0	\$0	\$0	\$0
98	Incorporate instructional technology goals into the District Strategic Plan and develop performance measures to track progress. p. 393	\$0	\$0	\$0	\$0	\$0	\$0	\$0
99	Conduct an annual physical count of	\$0	\$0	\$0	\$0	\$0	\$0	\$0

	hardware inventory. p. 397								
	Chapter 9 Total	(\$241,976)	(\$129,476)	(\$16,976)	(\$16,976)	(\$16,976)	(\$422,380)	\$0	
Chapter 10 Transportation									
100	Establish a section within the Transportation Department dedicated to safety and training. p. 414	(\$35,677)	(\$35,677)	(\$35,677)	(\$35,677)	(\$35,677)	(\$178,385)	\$0	
101	Create two full-time and one part-time dispatcher positions at the Clark Field facility. p. 416	(\$38,175)	(\$50,900)	(\$50,900)	(\$50,900)	(\$50,900)	(\$241,775)	\$0	
102	Provide an appropriate number of employees for routing and scheduling in the Transportation Department. p. 418	(\$120,266)	(\$160,355)	(\$160,355)	(\$160,355)	(\$160,355)	(\$761,686)	\$0	
103	Establish a target of 23 school buses per mechanic. p. 420	\$225,269	\$225,269	\$225,269	\$225,269	\$225,269	\$1,126,345	\$0	
104	Implement a performance-monitoring program to measure accomplishments and identify areas for improvement. p. 423	\$0	\$0	\$0	\$0	\$0	\$0	\$0	
105	Provide drivers and attendants a sensible, comfortable uniform. p. 425	(\$55,148)	(\$42,377)	(\$42,377)	(\$42,377)	(\$42,377)	(\$224,656)	\$0	
106	Use the routing and scheduling software to plan more efficient regular education routes to reduce the number of required school buses and drivers. p. 427	\$299,751	\$599,502	\$599,502	\$599,502	\$599,502	\$2,697,759	\$0	
107	Implement the routing and scheduling software for special education. p. 431	\$48,108	\$384,865	\$384,865	\$384,865	\$384,865	\$1,587,568	\$0	
108	Expand the training	(\$69,679)	(\$80,328)	(\$80,328)	(\$80,328)	(\$80,328)	(\$390,991)	\$0	

	program for new drivers to reflect the training curriculum recommended by the Texas Department of Public Safety and provide annual professional training for drivers. p. 434							
109	Revise the fleet procurement plan to replace buses annually based on miles operated, years of service and cost of maintenance. p. 438	(\$440,000)	(\$1,265,000)	(\$1,265,000)	(\$1,265,000)	(\$1,265,000)	(\$5,550,000)	\$0
110	Maintain a spare bus ratio of 15 percent. p. 440	\$0	\$0	\$0	\$0	\$0	\$0	\$0
111	Purchase equipment to implement a VMIS system to schedule preventive maintenance inspections, track vehicle maintenance records, analyze vehicle maintenance costs and monitor warranty on new vehicles. p. 441	\$0	\$0	\$0	\$0	\$0	\$0	(\$6,000)
112	Investigate outsourcing parts supply and inventory management. p. 443	\$0	\$81,000	\$81,000	\$81,000	\$81,000	\$324,000	\$0
113	Reward mechanics that achieve Automotive Service Excellence certification. p. 446	(\$2,000)	(\$8,000)	(\$8,000)	(\$8,000)	(\$8,000)	(\$34,000)	\$0
114	Conduct a feasibility study for outsourcing student transportation and develop a Request for Proposals. p. 451	\$0	\$0	\$0	\$0	\$0	\$0	\$0
115	Continue efforts to encourage shared services with the Fort Worth Transportation Authority. p. 455	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Chapter 10 Total	(\$187,817)	(\$352,001)	(\$352,001)	(\$352,001)	(\$352,001)	(1,595,821)	(\$6,000)

Chapter 11 Nutrition Services								
116	Hire permanent floater employees to fill absent positions. p. 463	\$291,401	\$291,401	\$291,401	\$291,401	\$291,401	\$1,457,005	\$0
117	Evaluate the warehouse and maintenance operations annually to determine what portion of costs are attributable to Nutrition Services. p. 467	\$0	\$0	\$0	\$0	\$0	\$0	\$0
118	Implement the automated payment feature for meals. p. 468	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000	\$20,000	(\$41,860)
119	Request that the City of Fort Worth Health Department inspect all FWISD school cafeterias on an annual basis. p. 469	\$0	\$0	\$0	\$0	\$0	\$0	\$0
120	Establish rules to control competitive food sales as required by the federal Child Nutrition Program guidelines. p. 471	\$17,398	\$17,398	\$17,398	\$17,398	\$17,398	\$86,990	\$0
121	Increase student meal participation in FWISD cafeterias. p. 473	\$0	\$8,167	\$8,167	\$8,167	\$8,167	\$32,668	\$0
122	Eliminate the duplicative entry of Nutrition Services financial data into the district's main accounting system. p. 479	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Chapter 11 Total		\$312,799	\$320,966	\$320,966	\$320,966	\$320,966	\$1,596,663	(\$41,860)
Chapter 12 Safety and Security								
123	Develop a comprehensive long-range districtwide safety and security plan that includes performance measures. p. 492	\$0	\$0	\$0	\$0	\$0	\$0	\$0
124	Implement procedures to include SSI officers'	\$0	\$0	\$0	\$0	\$0	\$0	\$0

	input on safety reviews and initiatives, incorporating their response into district planning and decision-making. p. 494							
125	Develop a maintenance and phased-replacement plan for security equipment. p. 495	(\$50,000)	(\$50,000)	(\$50,000)	(\$50,000)	(\$50,000)	(\$250,000)	\$0
126	Discontinue use of area advisor vehicles and implement automobile allowances. p. 496	\$0	\$5,599	\$5,599	\$5,599	\$5,599	\$22,396	\$0
127	Eliminate dispatcher overtime by varying the shift schedules for backup secretaries. p. 498	\$3,922	\$3,922	\$3,922	\$3,922	\$3,922	\$19,610	\$0
128	Develop computer reporting forms and electronic routing to collect, evaluate and report performance measurement and other safety management information efficiently. p. 502	\$0	\$0	\$0	\$0	\$0	\$0	\$0
129	Develop a policy to incorporate Crime Prevention Through Environmental Design principles into all new construction and renovation projects. p. 503	\$0	\$0	\$0	\$0	\$0	\$0	\$0
130	Adopt consistent districtwide emergency warning signals. p. 506	\$0	\$0	\$0	\$0	\$0	\$0	\$0
131	Enforce the dress code for campus monitors so visitors can easily identify them. p. 507	\$0	\$0	\$0	\$0	\$0	\$0	\$0
132	Expand the school monitor training curriculum and develop training materials for principals regarding campus monitor roles.	\$0	\$0	\$0	\$0	\$0	\$0	\$0

	responsibilities and duties. p. 507							
133	Design and implement a consistent districtwide identification system for students, staff and visitors. p. 510	\$0	\$0	\$0	\$0	\$0	\$0	\$0
134	Place clearly visible signs at all entrances directing visitors to the office for sign-in. p. 511	\$0	\$0	\$0	\$0	\$0	\$0	(\$12,000)
135	Align the oversight responsibilities for all alternative education programs under the director of Alternative Schools. p. 519	\$0	\$0	\$0	\$0	\$0	\$0	\$0
136	Develop a reporting structure to evaluate discipline management and related safety practices on a districtwide basis to identify, document and implement best practices. p. 520	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Chapter 12 Total	(\$46,078)	(\$40,479)	(\$40,479)	(\$40,479)	(\$40,479)	(\$207,994)	(\$12,000)
TOTALS ALL CHAPTERS								
	Gross Savings	\$2,384,342	\$4,695,644	\$5,560,420	\$5,560,420	\$5,560,420	\$23,761,246	\$0
	Gross Costs	(\$1,318,122)	(\$2,201,814)	(\$2,176,814)	(\$2,176,814)	(\$2,176,814)	(\$10,050,378)	(\$321,285)
	Total	\$1,066,220	\$2,493,830	\$3,383,606	\$3,383,606	\$3,383,606	\$13,710,868	(\$321,285)

Total Gross Savings	\$23,761,246
Total Gross Costs	(\$10,371,663)
Net	\$13,389,583

Chapter 1

DISTRICT ORGANIZATION AND MANAGEMENT

This chapter of the report reviews the organization and management of the Fort Worth Independent School District (FWISD) in four major sections.

- A. Governance
- B. Policy and Procedures
- C. District Management
- D. Planning and Evaluation

The organization and management of a school district requires cooperation between elected members of the Board of Education and staff of the district. The board's role is to set goals and objectives for the district in both instructional and operational areas; determine the policies that will govern the district; approve the plans to implement those policies; and provide the funding necessary to carry out the plans.

As the chief executive officer of the district, the superintendent recommends the staffing levels and the amount of resources necessary to operate and accomplish the board's goals and objectives. This position is also responsible for reporting management information to the board and making sure the district is accountable for its performance against established goals. District managers and staff are responsible for managing the day-to-day implementation of the board's policies and plans and recommending modifications.

Chapter 1

DISTRICT ORGANIZATION AND MANAGEMENT

A. Governance

FWISD's Board of Education consists of nine members. Trustees are elected to four-year terms on a rotating basis. The president is elected at large, and eight members are elected from single member districts.

The current board is shown in **Exhibit 1-1**.

Exhibit 1-1
FWISD Board of Education
2000-01

Board Member	Title	Term Expires	Full Years of Service as of 10/2000	Occupation
Gary J. Manny	President	2004	14 Years	Attorney
Christene C. Moss	Vice President	2002	10 Years	Clinic Manager
Rose Herrera	Secretary	2004	8 Years	Legal Assistant
Jean McClung	Member	2002	10 Years	Homemaker/Community Volunteer
T.A. Sims	Member	2004	17 Years	Pharmacist
Judy Needham	Member	2002	4 Years	Fundraising Consultant
Jesse P. Martinez	Member	2002	3 Years	Contract/Procurement Administrator
Elaine F. Klos	Member	2004	4 Years	Community Volunteer
Juan Rangel	Member	2004	1 Year	Consultant

Source: FWISD superintendent's office, October 2000.

Board meetings are held semi-monthly on the second and fourth Tuesday of each month. The first meeting of the month is a regular board meeting, and the second meeting is a special meeting to address particular agenda

items and to respond to public comments. The public has an opportunity to provide input at each of these meetings, but at the first meeting of the month their comments must address an agenda item. Meetings begin between 5:30 p.m. and 8:00 p.m. in the boardroom of the FWISD Administration Building, located at 2903 Shotts Street, and often do not end until past midnight. The board members begin each meeting by convening for dinner in the board conference room, during which consent agenda items are discussed. The board then goes into executive session and reconvenes the regular meeting in the main boardroom.

The board agendas are developed by the executive secretary of the board based on direction from the superintendent and board president. The superintendent reviews the draft agenda in his weekly executive staff meeting where executive staff can propose adding or deleting items. The final agenda is posted on the Thursday before the Tuesday meeting in the district's administration building and is mailed to the local media. In November 2000, the district started posting its agenda on the district Web site as well. Packets of background materials are distributed to board members, executive staff and members of the media who have registered with the executive secretary on the Thursday before the board meeting. Any member of the public also may request one.

Board of Education expenditures in 1999-2000 were \$523,321 (**Exhibit 1-2**). The largest board expenditures are board fees and dues, contracted services, salaries paid to two full-time-equivalent (FTE) support personnel and consulting fees.

**Exhibit 1-2
FWISD Board of Education General Fund Expenditures
1999 - 2000**

Category of Expenditure	Total
Board Fees & Dues	\$185,044
Miscellaneous Contracted Services	\$86,660
Salaries - Support Personnel	\$76,781
Consulting Services	\$70,849
General Supplies	\$39,106
Travel - Non-Employees	\$34,964
Utilities - Telephone	\$12,396
Extra Duty Pay - Support	\$6,782
Technology Equipment	\$2,015

Health & Life Insurance	\$1,563
Employee Allowances	\$1,396
Non-Contract Support Personnel	\$1,379
Auto Allowance	\$1,236
Workers' Compensation	\$1,158
Equipment Maintenance and Repair	\$718
Other Reading Materials	\$620
Social Security/Medicare	\$532
Unemployment Compensation	\$122
Total	\$523,321

Source: FWISD 1999-2000 Expenditure Reports.

FINDING

Public input is often responded to directly and immediately in board meetings, demonstrating the importance of this input to the governance of the district. Board minutes during 1999-2000 and the review team's observation of two board meetings in November 2000 showed immediate responses to several public input comments, usually by the superintendent. The public is allowed to make comments at both board meetings during the month, although the comments at the first meeting are limited to board agenda items.

This practice demonstrates that public comments are heard and considered by the board and the superintendent. The response takes additional meeting time, but the benefits of the practice outweigh the extra time required.

Many school boards and superintendents do not respond to any public input during board meetings. This practice contributes to a perception that public comments are not important to the governance of the district.

COMMENDATION

The superintendent often provides immediate verbal response to members of the community who ask questions or raise issues at board meetings, which demonstrates that the district is responsive to public concerns.

FINDING

The board's committee structure and the goals and purpose of each committee are not documented. There are several committees, but neither members of the district administration nor board members could identify all committees currently in existence. The committees listed by the board's executive secretary are the Budget/Audit Committee, the Calendar Committee and the Technology Advisory Committee. Only the Budget/Audit Committee has its purpose documented. Other committees mentioned during individual board interviews include the Board Policy Committee, After-School Program Committee, Alternative Education Committee, Athletics Committee, Real Estate Committee, Human Relations Committee and Career and Technology Committee.

The district also provided conflicting information as to whether some committees are created by the board or by the administration. Committees do not recommend decisions for board approval, but rather research a topic or assist in planning. Committee memberships, purposes, timelines and results are not articulated in the board minutes. The minutes of some committee meetings are on the consent agenda of the board, but there is no detailed reporting back of each committee's progress reflected in the board minutes.

Board members volunteer to serve on committees. As a result, some board members serve on as many as three committees and other board members do not serve on any.

Standing committees, appropriately configured, allow the board to have an open interaction with the superintendent and administrative team to better understand how policy decisions relate to district administration and operations. Accordingly, questions about administrative and operational issues and their effect on school district policy can be discussed in considerable detail and resolved by standing committees without prolonging regular board meetings. Without a workable standing committee structure, the board routinely questions information and materials provided by the superintendent during regular board meetings.

Spring ISD (SISD) has a committee system that allows board members to concentrate on key issues and use their time effectively. The board conducts most business through six standing committees: Audit, Benefits, Facilities Planning, Insurance and Legal, Educational Planning and Evaluation, and Policy. Dividing the workload into committees allows board members to study and discuss issues in greater depth. Each SISD board member, with the exception of the board president, chairs one committee and serves on two others. Appointments are rotated so that all trustees serve at one time or another on each committee. The president is an ex-officio member of all committees. Staff members support each committee, answering questions, conducting research at the request of the

committee and providing technical assistance as required. Board members at Spring ISD respond positively when asked about the committee structure, reporting that it allows in-depth analysis of issues and that board members have a mutual trust for each other and for the work of the staff.

Recommendation 1:

Formalize assignment and responsibilities of board committees.

The board should formalize five standing committees: (1) curriculum and instruction, (2) facilities, (3) technology, (4) planning, budget and finance and (5) policy.

Standing committees should be appointed annually, and each committee should have the following memberships:

- One or two board members;
- Superintendent or his designee (the superintendent will be an ex-officio member of all committees);
- At least one or more members of the superintendent's cabinet primarily responsible for the area covered by the standing committee; and
- At least one or more community advisors with specific expertise in operational and administrative functions covered by the committee.

Each committee should be responsible for reviewing action items and information items to be presented to the board during regular board meetings. The board should designate the purpose and date for reporting back for each committee in advance and document these decisions in the minutes. Actions taken by the committees will be presented to the full board for ratification. The board secretary should ensure that report dates are on the appropriate agenda.

Committee meetings will be the forums for board members and the superintendent's cabinet to engage in extended discussion and clarification of policy issues. More significantly, committee meetings will be open to the public since community members can provide valuable input for the board.

The use of a more formal committee structure should help reduce the length of board meetings by allowing more detailed consideration of issues in committee meetings.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent drafts a local board policy creating three or	June 2001
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	more formal standing committees.	
2.	The board approves the revision to local policy.	July 2001
3.	The board establishes regular meeting dates and times for the standing committees.	July 2001
4.	The board president appoints different members of the board to serve as chairperson of each of the standing committees.	August 2001
5.	The board begins to meet once each month for its standing committee meetings.	September 2001

FISCAL IMPACT

This recommendation could be implemented with existing resources.

FINDING

Board minutes are not approved for significant periods of time, up to one year later in many cases. The minutes remain in draft status until the board president reviews the minutes and presents them to the board in large groups for approval. During the November 14, 2000 board meeting, board minutes from July 13, 1999 through February 29, 2000 were approved. Minutes since March 7, 2000 remain in draft form.

There is no legal requirement to approve board minutes within a certain time period, but most districts approve board minutes during the following board meeting, allowing members to approve the contents of a meeting conducted only two to four weeks prior. This practice improves accountability to the community and leaves no uncertainty for district management as to the final direction of the board.

Recommendation 2:

Approve board minutes no later than one month after the date of the meeting.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board secretary types and proofs board meeting minutes within three business days after the board meeting.	June 2001
2.	The board secretary submits the minutes to the board president for review.	June 2001
3.	The board president makes any changes he considers	July 2001

	necessary, asking for verification against the audio or videotape if required.	
4.	The board secretary makes necessary changes, and distributes the draft minutes to the board members in their board packets for their review.	July 2001
5.	The board approves the minutes within one month of the board meeting and posts them on the district's Web site.	August 2001, and monthly thereafter

FISCAL IMPACT

This recommendation could be accomplished with existing resources.

FINDING

Board meetings do not begin on time, and timed agendas are not applied. Board minutes from the past year indicate that meetings are often called to order 35 to 60 minutes later than scheduled. Board meetings also last six hours or more, often past midnight. This is a concern of the majority of board members due to other personal and professional commitments.

Board agendas contain sufficient detail, but do not provide estimated times of when the agenda items will start. This information, if received in advance, helps board members evaluate whether sufficient time has been allocated to certain agenda items. Many districts use timed agendas as an effective meeting management tool for controlling the length of board meetings. The board president and other board members said that this board likes to have unconstrained discussions of issues, and that this open discussion makes the board more effective.

Recommendation 3:

Start board meetings on time, use timed agendas and reduce the length of board meetings.

As a courtesy to board members and the public attending board meetings, an attempt should be made to start board meetings at scheduled times and finish by midnight.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The president of the board meets with the superintendent before the agenda is distributed to determine how much time is needed for each item on the agenda.	June 2001
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2.	The agenda is circulated by the board secretary to board members for review, and they submit any changes in the time allocation they would like to request.	June 2001
3.	Any changes are made by the board secretary, and the agenda is posted.	June 2001
4.	The board president leads the meeting in accordance with agenda, directing individuals to keep within the time limits.	June 2001
5.	The above steps are repeated.	Every month thereafter

FISCAL IMPACT

This recommendation could be accomplished with existing resources.

FINDING

For the past two years, FWISD has not reported accurate board training information, giving the appearance that the district was not in compliance with Texas Association of School Boards (TASB) requirements. The requirements set forth by TASB for both new and experienced board members are presented in **Exhibit 1-3** below.

Exhibit 1-3 Overview of Continuing Education Requirements For School Board Members

Type of Continuing Education	First Year Board Member	Annual Requirements of Experienced Board Member
Orientation to the Texas Education Code	3 hours	Not required
Update to the Texas Education Code	Incorporated into Orientation to the Texas Education Code	After legislative session: of sufficient length to address major changes
Team-building Session/Assessment of Continuing Education Needs of the Board-Superintendent Team	At least 3 hours	At least 3 hours
Additional Continuing Education, based on assessed need and	At least 10 hours	At least 5 hours

Framework for School Board Development		
Total Minimum Number of Hours	16 hours, plus local district orientation	8 hours, plus update

Source: Texas Association of School Boards, Leadership Team Services, January 28, 2000.

The hours of training attended by each FWISD board member for the reporting periods May 1, 1998 to April 30, 1999, and May 1, 1999 to April 30, 2000, are presented in **Exhibit 1-4**. In 1998-99, district records showed three board members short of the required eight-hour minimum. In 1999-2000, two board members were reported as deficient. The district did not have any records to determine whether the first-year board member met the applicable training requirements; he has served on the board since May 2000.

Exhibit 1-4
Continuing Education Hours Attended by FWISD Board Members
May 1 - April 30, 1999 and 2000

Board Member	Continuing Education Hours	
	1998-99	1999-2000
Gary J. Manny	27.50	13.25
Christene C. Moss	2.00	5.00
Rose Herrera	0.00	13.25
Jean McClung	16.00	28.00
T.A. Sims	2.00	8.00
Judy Needham	13.25	9.25
Jesse P. Martinez	21.00	14.25
Elaine F. Klos	17.75	17.00
Juan Rangel	N/A	N/A
Rachel Newman (former board member)	8.00	3.00
Total Hours	107.50	111.00
Average Hours per Member	11.94	12.33

Source: FWISD board member training reports, January 25, 2001.

After the review team's initial analysis, the district worked with TASB to verify their board training records. Subsequent reports provided to the district by TASB showed that all but one board member in 1998-99 met the requirements, and this board member underwent surgery during that year. Each TASB report contains a statement at the bottom of each page that "official recordkeeping of Board Member continuing education credit is the responsibility of the district."

The board secretary has primary responsibility for maintaining board member training records. The current board secretary has been in the position for less than one year.

Recommendation 4:

Track board member training hours to ensure compliance with state requirements for continuing education.

The district should maintain current, accurate records for board training and verify its data with TASB on a quarterly basis. District records should be updated immediately to ensure board member compliance with TASB requirements.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The board secretary develops a tracking system for recording board member training hours, by required category.	June 2001
2.	The board secretary compares board member training hours to TASB reports on a quarterly basis and makes necessary adjustments.	August 2001, and quarterly thereafter
3.	The board secretary prepares a quarterly report for the board identifying training hours taken and training hours needed during the remainder of the training year.	August 2001, and quarterly thereafter

FISCAL IMPACT

This recommendation could be accomplished with existing resources.

FINDING

FWISD does not offer a district orientation for new board members. Most board members have significant experience with the district. The average

tenure is 6.8 years. Two board members said that the lack of an orientation program puts new members at a disadvantage.

State law requires local district orientation to take place within 60 days of an election or appointment of board members. Further, the lack of an orientation program increases the learning curve for new board members and reduces the board's effectiveness as a group.

Recommendation 5:

Provide orientation for new board members.

The district should tailor the basic content contained in the TASB Institute For School Trustee Development's "TASB ISD Level One Curriculum," including Boardmanship Basics, Teamwork Basics, School Law Basics, District Governance Basics, District Planning and Accountability Basics, and School Budget and Finance Basics to FWISD's particular policies and history. In addition, the district should brief new board members on the structure of the administration, the roles of various members of the community and teacher groups and the protocol for board meetings. District budgets for the previous three years, as well as superintendent evaluations, should be provided for new members' review before their first board meeting.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board president appoints a member of the board to draft curriculum for newly elected board members with the help of the board's Executive Secretary.	July 2001
2.	The board reviews and approves the proposed curriculum.	September - October 2001
3.	The superintendent provides copies of the budgets and evaluations and any other requested information to any new board members.	Immediately following each school board election
4.	The board president contacts the newly elected board members to advise them of the board orientation.	Immediately following each school board election
5.	Newly elected board members complete the training conducted by the Executive Secretary of the Board.	After each school board election and before a new member's first meeting

FISCAL IMPACT

This recommendation could be accomplished within existing resources.

Chapter 1

DISTRICT ORGANIZATION AND MANAGEMENT

B. Policy and Procedures

School district policies should be clear, concise and in compliance with state law. Effective policies are regularly reviewed, updated and disseminated to board members, staff and made available to the public.

FWISD maintains 503 hard copies of the district policy manual, each of which is contained in two binders and checked out to individual employees. Updates are provided twice a year by TASB and as needed by the district based on changes in legal and local policies occurring throughout the year.

FINDING

The district's policy manual is not automated, although the administrator responsible for policy development said that there are plans to automate it in 2001. Automation has been delayed thus far because the district continues to review and revise its policies.

The district currently uses the TASB policy manual update service. In 2000, TASB representatives told the district and the review team that automation of the policy manual could not occur through their service until the board completed its revisions of local policies. The TASB representative who works with FWISD said that TASB's policy review with the district was complete and that TASB was waiting to receive board-approved revised policies from the district. As of January 2001, the district has not finished its review of policies. TASB will not automate the manual until this review is complete.

Tyler ISD is one of many school districts in Texas currently using TASB's on-line policy manual. The on-line policy manual provides significant benefits to a school district and its community. It allows immediate Web access to policies through index keys and is available to district staff, students and the public.

Recommendation 6:

Automate the policy manual, and immediately update policy changes.

Policies are continuously in a state of change. The district should not wait until all policies are "finished" because subsequent revisions will be needed. The district should negotiate with TASB for the earliest possible

date of automation after the current set of revisions is completed, which should be completed as soon as possible.

Administrative regulations also should be included on the Web site. Changes to policies should be made on line so that administrators do not have to manually insert changes in their manuals and policies can be updated immediately.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent directs the Technology Department to automate the policy manual and to negotiate with TASB to do so as soon as possible.	June 2001
2.	The Technology Department and person responsible for updating policy manuals prepare a revised procedure stating that the official policy manual is available on-line and sends the policy to the superintendent for approval.	August 2001
3.	The superintendent prepares a memo or e-mail directing all administrators that the online copy of the policy manual should be used throughout the district.	August 2001

FISCAL IMPACT

The district included the initial fee of \$1,700 to automate the manual in its 2000-01 operating budget. The annual maintenance fee of \$750 should be included in each following year. New or revised policies are now distributed to 503 holders of the policy manual twice each year. If only ten master sets of the policy manual are maintained in hard-copy form instead of 503, a net savings of \$9,110 per year should result: an estimated 10 cents per page for copying and distribution x 200 pages of updates per year x 493 copies = \$9,860 less \$750 for annual maintenance of automated system = \$9,110.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Automate the policy manual, and immediately update policy changes.	\$9,110	\$9,110	\$9,110	\$9,110	\$9,110

FINDING

FWISD does not have a full-time employee dedicated to updating district policies and procedures. The district maintains a part-time administrative position to update the district's policies, working with the board to draft

and approve changes. This employee is also responsible for disseminating updated pages to the 503 holders of the policy manual in the district. The position reports to the associate superintendent for Instruction for Area I. This position is not responsible for verifying that the policies are in compliance with the law. The Board of Education, the district's in-house attorney and TASB jointly share this responsibility.

Although this administrator works closely with the superintendent's cabinet and other district managers on policy matters, she is not responsible for development or monitoring of procedures. District procedures are not maintained or coordinated at a central location in the district. In addition, several departments do not have procedures that are documented, current, complete and followed. Employees in some departments are not aware that documented procedures exist.

San Antonio ISD (SAISD) maintains a comprehensive administrative procedures manual with policies clearly linked to procedures. The components of the manual are shown in **Exhibit 1-5**. Administrative forms are included with appropriate administrative procedures. Procedures are disseminated in hard-copy format to all holders of the manual as they are developed. Unlike some districts, which keep procedures in separate manuals or in procedural memos distributed among various departments and divisions, SAISD consolidates their procedures in a central location. The comprehensive document enables district personnel to quickly and efficiently access specific procedures as needed.

Exhibit 1-5
Contents of Administrative Procedures Manual
San Antonio Independent School District

- | |
|--|
| <ol style="list-style-type: none">1. Outline of Administrative Procedures2. Basic District Foundations3. Local District Governance4. Business and Support Services5. Personnel6. Instruction7. Students8. Community |
|--|

Source: SAISD, Administrative Procedures Manual, 1999.

The person responsible for FWISD policy development is a former district administrator who was brought back on a part-time basis at a \$35 hourly rate. This position has been paid a maximum of \$24,000 in one year, but the workload and related pay has varied over the past two years.

Recommendation 7:

Create a full-time policy and procedures coordinator position and begin the documentation of procedures.

FWISD should integrate the coordination of policies and procedures into a single position. This position should be responsible for developing the outline and format for district procedures, ensuring that all departments have documented procedures and track updates to those procedures. Updates or procedure changes may be prompted by changes in policy, new information systems, or discovery of a more efficient or effective procedure. Procedures should not include computer system instructions, but should reference such documentation. The procedures, like the policy manual, should be automated and on-line.

Exhibit 1-6 provides a suggested framework for documenting procedures. Each procedure should include a name and purpose, a reference number, date of most recent update, names of positions performing each task and a brief description of the task, the frequency of its occurrence and the signature of the person responsible for approving the procedure.

Each department should be responsible for developing and documenting its own procedures according to the prescribed format. The Internal Audit Department can use these documented procedures to perform compliance testing.

Exhibit 1-6
Suggested Framework for Documenting Procedures

Name of Procedure:	Reference #:
Purpose of Procedure:	
Department Responsible:	
Policy or Administrative Regulation references:	
Frequency of Occurrence:	
Position	Action Steps
Title	1.
	2.
	3.
Other Related Procedures / Computer Documentation:	
Procedures Approved By:	

Source: Gibson Consulting Group, Inc.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	Upon receiving board approval, the superintendent creates a job description for the new position.	June 2001
2.	Upon receiving board approval, the part time administrative position is eliminated.	June 2001
3.	The assistant superintendent of Human Resources posts the position.	June 2001
4.	The superintendent directs department heads to document, review and update procedures.	August 2001
5.	Department heads document all procedures with appropriate departmental staff.	August - November 2001
6.	Department heads, along with appropriate departmental staff, draft flow charts for each department to clarify the purpose of each procedure.	September - November 2001
7.	The superintendent, executive staff and the policy and procedures coordinator review all procedures to determine	December 2001 - January 2002

	what updates are needed to be complete and in compliance with district policy.	
8.	Department heads draft revised procedures.	February - March 2002
9.	Department heads circulate procedures for executive staff and superintendent to review and revise where appropriate.	April 2002
10.	The superintendent presents procedures to the board.	May 2002
11.	The policy and procedures coordinator monitors changes in procedures due to changes in policy, computer systems and other factors and ensures that procedures are current.	Ongoing

FISCAL IMPACT

The cost of the full-time procedures coordinator is based on an average coordinator salary of \$51,512 per year. The net cost to the district will be this salary plus benefits, less the current cost of the part-time administrator. The total cost of the coordinator is \$58,188 (\$51,512 plus 9.35 percent and \$1,860 for benefits). The total savings from eliminating the part-time position is \$28,104 (\$24,000 plus 9.35 percent and \$1,860 for benefits). The net cost to the district is \$30,084 per year.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Create a full time policy and procedures coordinator position and begin the documentation of procedures.	(\$30,084)	(\$30,084)	(\$30,084)	(\$30,084)	(\$30,084)

Chapter 1

DISTRICT ORGANIZATION AND MANAGEMENT

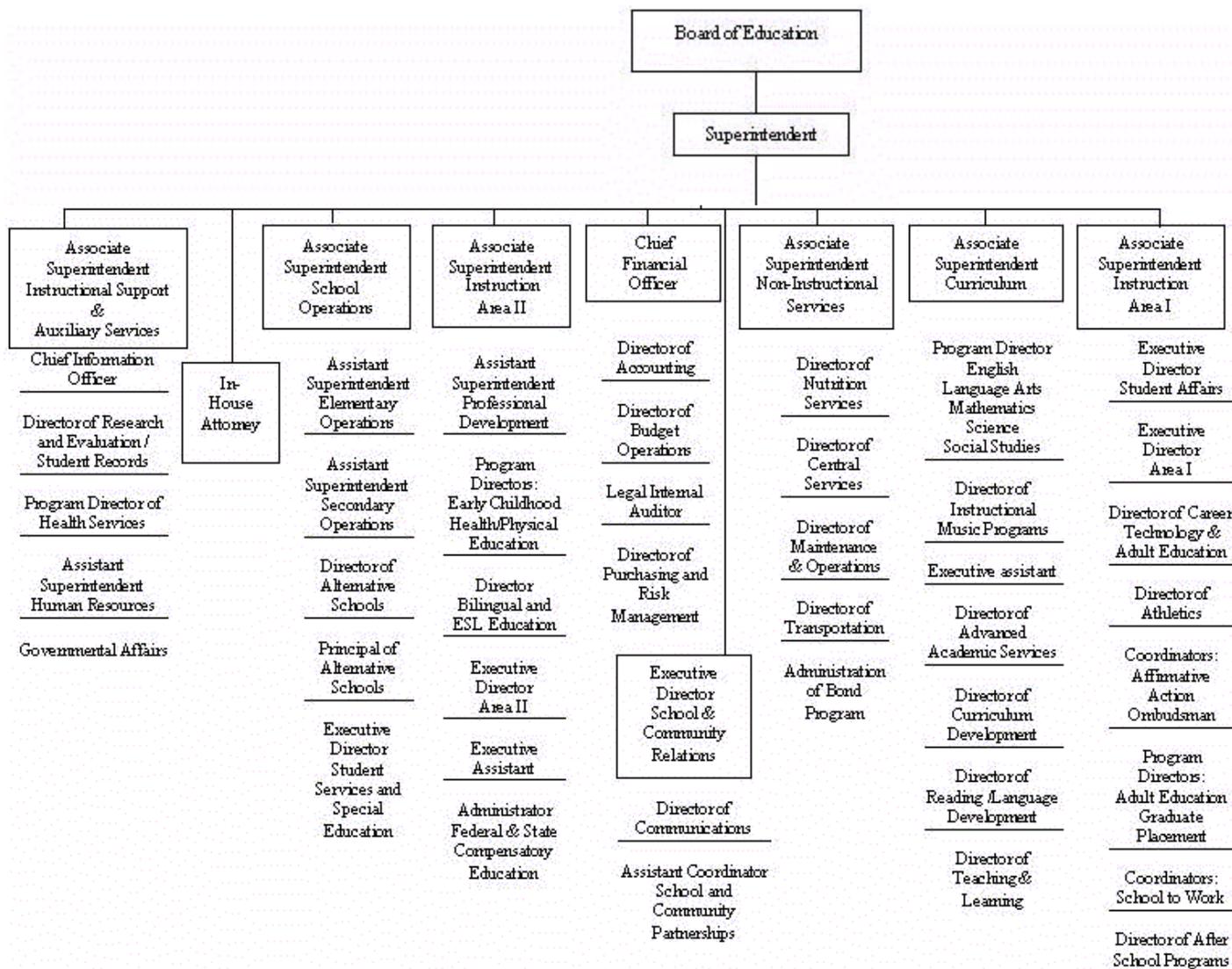
C. District Management

Dr. Thomas Tocco is the FWISD superintendent and the chief executive officer of the district. The superintendent's cabinet is the district's executive leadership team responsible for day-to-day operations and administration. The cabinet consists of the following positions:

- associate superintendent of Instruction for Area I
- associate superintendent of Instruction for Area II
- associate superintendent for School Operations
- associate superintendent for Curriculum
- associate superintendent for Instructional Support and Auxiliary Services
- associate superintendent of Non-Instructional Services
- chief financial officer
- assistant superintendent for Human Resources
- assistant superintendent for Elementary Operations
- assistant superintendent for Secondary Operations
- assistant superintendent of Professional Development
- executive director of School and Community Relations
- executive director of Student Services and Special Education
- executive director for Area I
- executive director for Area II
- executive director of Student Affairs
- district general counsel

Exhibit 1-7 presents FWISD's organizational structure.

Exhibit 1-7
FWISD Organization
2000-2001



Source: FWISD organization chart, January 19, 2001.

Board Policy

FINDING

FWISD has a staff attorney to control the cost of legal fees and related expenses. The staff attorney provides direct legal support and advice to administrators and school personnel about contractual matters, employee grievances, student discipline hearings, interpretation of board policy and employment matters, Workers' Compensation, Open Records and Open Meetings Act issues and special education matters.

The coordinator of Special Investigations, who reports to the director of Student Affairs, conducts investigations of alleged incidents of serious misconduct including sexual harassment, employee assaults of students or fellow employees, felonies or offenses involving moral turpitude. The staff attorney coordinates and monitors services provided by outside legal counsel, particularly services related to special education matters, litigation and special legal matters requiring outside expertise. **Exhibit 1-8** summarizes legal fees paid to outside counsel by FWISD for the past two years.

Exhibit 1-8

Summary of Fort Worth ISD Legal Service Expenses

Fiscal Years 1998-99 and 1999-2000

FIRM	AREA	Legal Fees 1998-99	Legal Fees 1999-2000
Chappell, Parmalee, Johnson & Hill	Litigation, contracts, general legal services	\$507,449	\$477,962
McDonald Sanders	Property acquisition (bond program)	\$100,153	\$102,984
Taylor, Olson, Adkins	Elections	\$15,777	\$14,503
Sonyia Byrd	Property acquisition	\$0	\$2,659
Flores & Utt, P.C.	General legal services	\$0	\$2,025
Totals		\$623,379	\$600,133

Source: FWISD Office of the In-House Counsel.

FWISD's approach to legal services saves the district money. The use of an in-house counsel helps reduce the need for more expensive outside legal services. **Exhibit 1-9** shows that the FWISD's legal fees per student compare favorably to its peer districts. Only Houston ISD showed lower legal fees per student in 1998-99.

Exhibit 1-9

**Comparative Analysis of Peer District Legal Fees
1998-99**

District	Legal Fees per Student
Dallas ISD	\$22.30
Austin ISD	\$21.71
El Paso ISD	\$12.49
Fort Worth ISD	\$8.80
Houston ISD	\$6.91

Source: PEIMS data files, actual expenditures 1998-99.

COMMENDATION

FWISD's use of an in-house attorney is effective in controlling outside legal fees.

FINDING

Many related FWISD programs and departments are spread around the organization without logical alignment or grouping. This limits the district's ability to plan and measure performance at higher levels in the organization.

Technology, School Health Services, Research and Evaluation, Governmental Affairs and Human Resources are grouped under the associate superintendent for Instructional Support and Auxiliary Services. None of the functions under this associate superintendent represent auxiliary services, which usually include food services, transportation and maintenance. These functions report to the associate superintendent of Non-Instructional Services. Most of the instructional support services, including the district's Instructional Support Teams, are under the associate superintendent of Instruction for Area I or the associate superintendent of Instruction for Area II.

The chief information officer reports to the associate superintendent of Instructional Support and Auxiliary Services and is not a member of the superintendent's cabinet. Certain information functions, such as the submission of information for the Public Education Information Management System (PEIMS), do not report to the chief information officer. This structure does not reflect the importance of technology in major district decisions or the breadth of responsibility for information management.

Four associate superintendents have a variety of unrelated programs reporting to them. Early childhood, health and physical education, Bilingual/ESL education and professional development report to one of the associate superintendents of Instruction. Athletics, Student Affairs, Career and Technology Education, School to Work, the Ombudsman, Affirmative Action, adult education, after school programs and the district's board policy staff report to another associate superintendent of Instruction. In addition to all curriculum areas, Gifted and Talented Education and the director of Teaching and Learning - a professional development function - report to the associate superintendent for Curriculum. Alternative education programs provided by the district report to the associate superintendent for School Operations and contracted alternative education programs report to an associate superintendent of Instruction.

The assistant superintendent of Professional Development reports to the associate superintendent of Instruction - Area II. This position has two employees reporting to it, one of which is a secretary. This position also coordinates the Leadership Academy, but is not directly involved in its operation. The only other assistant superintendent position in the district is the assistant superintendent for Human Resources, who oversees 48 employees. Other professional development functions report to the associate superintendent for Curriculum or the assistant superintendent for Human Resources.

The superintendent makes organizational changes at least every two years to elevate certain functions needing higher district priority or to lower those having less priority. He also assigns problem areas or departments to individuals he thinks will bring the quickest improvement, regardless of the relationship to other functions in their organizational unit.

The current structure inhibits effective planning and budgeting within the district. Division leaders are unable to make resource allocation decisions among related areas because not all related areas are under their control. Financial data at the department or division level would not be informative since some of the underlying departments are not related. The district's accounting system does not constrain such reporting. Through a custom reporting feature, it has the ability to roll up department units to division level reporting.

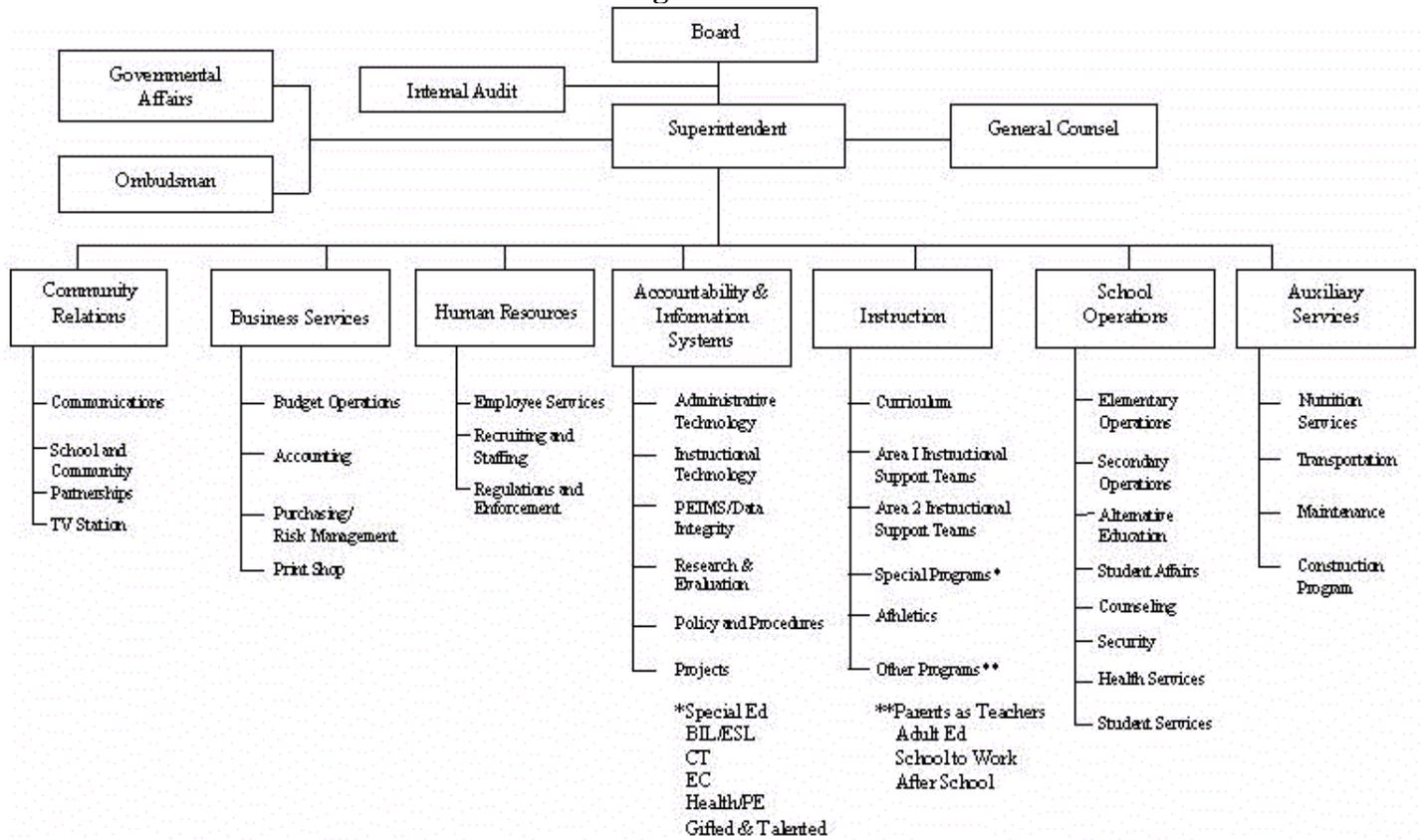
The open communication among the district's management team helps support the coordination of programs across the organization, but the current structure does not represent a logical alignment of similar functions - a goal of organization planning.

Recommendation 8:

Realign the organizational structure to reflect a logical alignment of functions that can be linked to the planning and budgeting process.

The roles and responsibilities of the positions that report to the superintendent should represent logical groupings of related functions. Over the next three years, the district should shift to the organization structure presented in **Exhibit 1-10**.

**Exhibit 1-10
Recommended Organization Structure**



Source: Gibson Consulting Group, Inc.

An assistant superintendent position for Human Resources should report directly to the superintendent, particularly in light of the large percentage of the district's budget dedicated to salaries. This position should oversee all professional development programs and Affirmative Action.

The assistant superintendent of Professional Development position should be downgraded to executive director to reflect the level of responsibility and be aligned under the Human Resources department.

The chief information officer position should be expanded to reflect responsibility for information systems and information management. The organizational units in the area should include administrative technology, instructional technology, PEIMS/data integrity, research and evaluation and district policy and procedures. The chief information officer should report directly to the superintendent. The Research and Evaluation unit should be expanded to include responsibility for evaluation of non-instructional areas. The Quality Review Teams should report to the Research and Evaluation unit.

Governmental Affairs and the district Ombudsman should each report directly to the superintendent. The executive director of Community Relations should oversee TV Communications and school and community partnerships.

Alternative Education should be consolidated under a single associate superintendent for School Operations. That associate superintendent should continue to report directly to the superintendent and also should oversee Student Affairs, Counseling, Security and Health Services in addition to Elementary Operations, Secondary Operations and Student Services.

Educational programs should be realigned under a single associate superintendent for Instruction. That associate superintendent should oversee Curriculum; Instructional Support Teams for Area One and Area Two; Special Programs including Special Education, Bilingual/ESL, Career and Technology, Early Childhood, Health/PE, and the Gifted and Talented program; Athletics; and Other Programs including Parents as Teachers, Adult Education, School to Work and After School programs.

Whenever possible, the superintendent should use resignations and retirements in current positions to prompt the recommended changes.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent evaluates the proposed organization structure against current positions and individuals in his cabinet.	June 2001
2.	The superintendent develops an organizational plan and implementation timetable and presents it to the board.	July 2001
3.	The assistant superintendent of Human Resources initiates the creation of new job descriptions for new and redefined positions.	August 2001
4.	The chief financial officer develops reports to provide the rolling up of program and department financial information to levels consistent with the scope of responsibility of	August 2001

	specific management positions.	
5.	The superintendent implements the organizational changes.	August 2001 - August 2004

FISCAL IMPACT

The realignment of functions and changes in position grades can be done without adding administrative costs to the district if the position upgrade for the chief information officer is implemented simultaneously with the downgrade of the assistant superintendent for Professional Development. Other realignments can be accomplished with existing resources.

FINDING

The district uses staffing allocation formulas for certain school positions, but they are not strictly adhered to. Secondary schools have formulas for principals, assistant principals and counselors (**Exhibit 1-11**), but the formulas allow for variations based on "specific need, special programs, mobility of students, and/or fluctuating enrollment."

**Exhibit 1-11
Secondary School Staffing Formula**

School / Size	Principal	Assistant Principal	Counselor
6 th Grade	1	1	1
Middle School	1	2	2
High School			
0-1,499	1	3	2
1,500 +	1	4	3

Source: FWISD Office of School Operations.

Each of the secondary schools has one principal. **Exhibit 1-12** shows the actual number of assistant principals, coordinators and clerical staff at the sixth grade centers and middle schools. Staffing for coordinators and clerical staff is not assigned by formula, but the actual counts for clerical staff depend on the number of students.

**Exhibit 1-12
FWISD Middle School Administrative Staffing
2000-01**

School	Enrollment	Assistant Principals	Coordinators	Clerical Staff
Applied Learning	285	1	0	3.0

Dunbar 6 th	305	1	0	3.0
McLean 6 th	344	1	0	3.0
Glencrest	402	2	0	2.0
Rosemont 6 th	463	1	0	3.0
Leonard 6 th	507	1	0	3.0
Wedgwood 6 th	520	1	0	3.0
Morningside	598	2	1	5.4
Kirkpatrick	602	2	0	3.0
Daggett	649	2	1	4.2
McLean	676	2	0	6.0
Stripling	729	2	0	6.0
Forest Oak	731	2	0	6.0
Monnig	748	2	0	5.4
Meacham	805	2	0	6.0
Handley	819	2	0	6.0
Dunbar MS	823	2	1	5.4
Leonard MS	859	2	0	6.0
Riverside	861	2	0	5.4
Rosemont MS	966	2	0	7.0
Wm James	1,047	3	1	5.0
Wedgwood MS	1,054	2	0	6.0
Meadowbrook	1,156	3	0	6.0
J.P. Elder	1,159	3	1	5.6

Source: FWISD Office of School Operations.

Three middle schools have an additional assistant principal based on special needs of those schools. **Exhibit 1-13** presents the same staffing information for FWISD high schools.

Exhibit 1-13
FWISD High School Administrative Staffing
2000-01

School	Enrollment	Assistant Principals	Coordinators	Clerical Staff
Diamond Hill-Jarvis	836	3	0	6
Amon Carter	863	3	0	7
Poly	1,137	3	1	9
Dunbar	1,225	3	1	9
South Hills	1,232	3	0	6
Trimble Tech	1,467	4	0	9
Western Hills	1,500	3	0	8
O.D. Wyatt	1,515	4	1	9
Southwest	1,524	3	0	8
Eastern Hills	1,592	4	1	8
North Side	1,707	4	0	9
Arlington Heights	1,738	3	0	8
Paschal	2,088	4	0	11

Source: FWISD Office of School Operations.

FWISD's administrative staffing for secondary schools compares favorably to other Texas school districts. Cypress-Fairbanks ISD (CFISD) assigns two to four assistant principals to secondary schools based on student enrollment. FWISD does the same. Seven clerical positions are assigned to each middle school in CFISD, regardless of size. In Round Rock ISD, secondary school clerical staff allocations range from five to eleven positions based on enrollment. All middle schools in FWISD have seven or fewer clerical positions.

Exhibit 1-14 shows the staffing formula for elementary schools. All schools are assigned one principal, but the number of assistant principals and/or instructional specialists depends on enrollment. For example, a school of under 499 students should have one instructional specialist; a school of 500-599 should have one assistant principal; and a school of over 900 students should have two assistant principals and one instructional specialist. The formulas for elementary school administrative staffing do not include a provision for meeting special needs.

**Exhibit 1-14
Elementary School Staffing Formula**

Enrollment	Principal	Assistant Principal	Instructional Specialist
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0- 499	1	0	1
500 - 599	1	1	0
600 - 799	1	1	0.5
800 - 899	1	1	1
900 +	1	2	1

Source: FWISD Office of School Operations.

Of the elementary schools with enrollment less than 500 students, 18 have the number of assistant principals prescribed by the formula, and 11 have more than the formula amount. According to district management, these additional positions are allocated based on the special needs of the school. Also, while each of these schools should have an instructional specialist based on enrollment, one of these schools does not have any, and two have more than one.

Recommendation 9:

Apply existing elementary formulas to determine appropriate staffing levels for schools.

The district should allocate administrator positions to elementary schools according to the formula. This will ensure an equitable distribution of resources for administrative resources.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The associate superintendent for School Operations identifies formula variances in staffing levels by school and makes staffing adjustments in the 2001-02 budget.	June 2001
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FISCAL IMPACT

The instructional specialist positions can be reassigned without any fiscal impact to the district. Of the 11 assistant principal positions, five reductions can be achieved in 2001-02 with six more in 2002-03 through attrition or reassignment to other district vacancies. The average salary of an assistant principal at a FWISD elementary school is \$49,972. Based on health insurance cost of \$1,860 and a benefits rate applied to salary of 9.35 percent, estimated savings are \$282,520 (\$56,504 x 5) in 2001-02, and \$621,544 (\$56,504 x 11) each year thereafter.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Apply existing formulas to determine staffing levels for elementary schools.	\$282,520	\$621,544	\$621,544	\$621,544	\$621,544

Chapter 1

DISTRICT ORGANIZATION AND MANAGEMENT

D. Planning and Evaluation

Planning is essential to effective school district management. Proper planning establishes a mission and identifies goals and objectives, sets priorities, identifies ways to complete the mission and determines performance measures and benchmarks. In its purest sense, planning anticipates the effect of decisions, indicates possible financial consequences of alternatives, focuses on educational programs and methods of support and links student achievement to the cost of education.

The superintendent is primarily responsible for FWISD's planning effort. The superintendent and members of the cabinet establish district goals, called imperatives at FWISD, and review them with the board. The superintendent directs a planning process in which FWISD stakeholders are brought together on an ongoing basis to review the goals and objectives, provide constructive input and review the progress of the strategic plan. Through its strategic planning process, FWISD solicits input, refines its district vision and mission, establishes new goals and objectives as necessary and regularly reports progress to the board and community.

FINDING

In the budget planning process, the board does not formally document its priorities or demonstrate that those priorities are met in the budget. In addition, the timing of the district's planning process does not allow the board's priorities to drive the budget. The budget process precedes most of the formal planning activities for the school year, although informal planning activities occur year round.

The board does not hold a planning retreat. Board members said that they held this meeting annually until 1994 but did not feel it effectively served its purpose once the press started to attend. All planning done by the board, including development of the five-year Strategic Plan and the annual District Educational Improvement Plan (DEIP), occurs between mid-August and the end of September, after the budget has been adopted.

District Site-Based Decision-Making (SBDM) committees do not meet early enough to influence the school planning process. FWISD forms the SBDM committees prior to September 1 of each school year, in accordance with state law. Campus Educational Improvement Plans (CEIP) must be finalized and approved by the first week in October.

SBDM committee meeting patterns were analyzed at four schools. Committees at two of the schools met once in August or September for one hour, the required minimum for a SBDM committee meeting. During the meeting, the committees reviewed a draft of the CEIP that was developed earlier by the principal and school staff. After the CEIP was approved in October, the SBDM committees did not continue to meet.

At two other schools, the SBDM committees met twice to review the CEIP, but the community members did not participate in the process until September. However, the committees at these two schools continue to meet monthly throughout the school year. Most of the new members of SBDM committees at the four schools did not receive training until after the meeting to discuss the plan, and in some cases after the CEIP was approved.

The Texas Education Code, Subchapter F. "District-Level and Site-Based Decision-Making," section 11.251, "Planning and Decision-Making Process," subsection (b), requires the board to "establish a procedure under which meetings are held regularly by district and campus-level planning and decision-making committees." In addition, section 11.253 of the Texas Education Code, "Campus Planning and Site-Based Decision-Making," subsection (h) requires that "a principal shall regularly consult the campus-level committee in the planning, operation, supervision and evaluation of the campus educational program." FWISD local policy states that "the site-based decision-making team shall meet at the call of the principal with a minimum of six meetings per year."

Principals at two of the four schools said that it is difficult to attract community members to participate on SBDM committees due to many parents having two jobs or other personal or professional commitments. All four principals interviewed said SBDM committees could be more effective, and only one principal said that the committee was actively involved in decision-making throughout the school year.

A best-practice example is Cypress-Fairbanks ISD's (CFISD) use of a comprehensive planning and budgeting process that integrates all of the district's plans and budgeting within a yearly timetable. **Exhibit 1-15** shows CFISD's planning and budget process.

Exhibit 1-15 Planning Timetable

Cypress-Fairbanks ISD Yearly Planning and Budget Process

Planning Activities and Products	Month (by number)											
	12	1	2	3	4	5	6	7	8	9	10	11
Long Range Plan	X	⇒	○	E	E	E	E	E	E	E	E	E
Board Goal Setting	X	⇒	○	E	E	E	E	E	E	E	E	E
District Improvement Plan	E	X	⇒	⇒	⇒	○	E	E	E	E	E	E
Budget Development	X	⇒	⇒	⇒	⇒	⇒	⇒	○	E	E	E	E
Student Enrollment	X	⇒	○	E	E	E	E	E	E	E	E	E
Staffing	X	⇒	⇒	○	E	E	E	E	E	E	E	E
Salary Package*	X	⇒	⇒	⇒	○							
Superintendent/ Principal Student Achievement Meetings										X	○	○
Superintendent's Staff Development for Principals		○	○	○	○	○	○		○	○	○	○
Campus Improvement Plans	E	E	E	E	X	⇒	⇒	⇒	⇒	X	○	E
District Evaluation Report	E	E	X	E	E	E	E	E	E	E	E	E
District Performance Report	E	E	X	E	E	E	E	E	E	E	E	E
Legend: X = planning process begins; ⇒ = planning process is ongoing; ○ = process is complete/product presented; E = monitoring and evaluation is ongoing; * = non legislative year												

Source: CFISD Central Administration/Superintendent's Office.

Recommendation 10:

Start the planning process in December of each school year to allow sufficient planning time for the next year's budget.

The district needs to adjust the planning timeline so that most planning occurs before the budget is adopted. The strategic plan, the DEIP, CEIPs and spending priorities should drive the budget. The board should formally document its priorities and demonstrate that those priorities are met in the budget. All planning should be completed by the end of June, and can be updated in September and October after the tax rate is established and more current student performance is available. The board's planning efforts should also include a planning retreat in January or February of each year so that the board members have time to discuss major planning issues.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board directs the superintendent to develop a comprehensive planning process and timeline based on CFISD or a similar model that allows the DEIP and Strategic Plan to be completed by the end of June or July at the latest in future years.	June 2001
2.	The board approves and supports the model.	August 2001
3.	The board president assigns the superintendent the responsibility for collecting information about a planning retreat for the board.	September 2001
4.	The superintendent and board president identify at least three facilitators who are qualified to lead board retreats and request proposals from each.	October 2001
5.	The superintendent identifies a neutral facility that accommodates a two-day retreat for 10 people.	October 2001
6.	The board president, in conjunction with the superintendent, selects a team-building facilitator and the facility for the retreat.	October 2001
7.	The board approves the selection of the facilitator and neutral facility, and selects the date of the retreat from a list of available dates.	October 2001
8.	The board and superintendent attend a planning retreat.	November 2001
9.	The board and superintendent attend a second planning retreat, with annual retreats thereafter.	May 2002 and annually thereafter
10.	The superintendent makes an annual report to the board regarding the implementation and impact of the model.	Ongoing

FISCAL IMPACT

Other than the retreat, this recommendation can be implemented with existing resources. A two-day annual planning retreat will include the cost of a facilitator and space to hold the meeting, including meals. Based on the district's historical experience with similar meeting functions, the estimated cost of a facilitator is \$1,500 per day. The district generally holds similar conferences and meetings in the board conference room, eliminating the need to rent a facility. Assuming a two-day planning session with one meal served each day, the total cost is expected to be no more than \$4,000.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Start the planning process in December of each school year to allow sufficient planning for the next year's budget.	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)	(\$4,000)

FINDING

FWISD's strategic plan does not specify any goals to be met under any of the proposed supporting imperatives, and the vision for non-instructional areas is not defined or described. The focus of the strategic plan is almost exclusively on instruction.

A district strategic planning committee was formed to develop the initial strategic plan, with input from the community through focus groups, but this committee no longer exists. The board and District Advisory Committee recommend and approve updates to the strategic plan.

The district's 2000-05 Strategic Plan was developed in 1995 and is updated annually. This plan is a one-page front and back pamphlet that establishes 12 goals or imperatives for the district. Three imperatives were added this year. Following each of the imperatives, the strategic plan identifies between one and five specific goals in each area. For example, under Guarantee of High Quality Schools for All Students, the plan says "all campuses will achieve a rating of recognized or Exemplary through the state's accreditation system within five years." No specific implementation steps on how to accomplish these goals or evaluation measures are identified. These steps are identified in the DEIP however. Below are excerpts from the 2000-05 Strategic Plan imperatives.

- Imperative 1: Guarantee High Quality Schools for All Students - all campuses are to achieve a rating of Recognized or Exemplary within five years.
- Imperative 2: Reading - students will be able to read by the end of Grade 2 as measured by the Texas Primary Reading Inventory (TPRI) and the Stanford Achievement Test, version 9 (SAT 9). The district pass rate, as measured by the state assessment for reading, will meet or exceed state levels in all grades and among all student groups.
- Imperative 3: English Language Arts - students will meet or exceed the passing rate, as measured by the state assessment for writing, in all grades and among all student groups. The percentage of students passing the End-of-Course examination for English II will meet or exceed the statewide percentage levels.

- Imperative 4: Mathematics - students will meet or exceed the passing rate, as measured by the state assessment for mathematics, in all grades and among all student groups. The percentage of students passing the End-of-Course algebra examination will meet or exceed the statewide percentage levels. Students will demonstrate mastery of pre-algebra by the end of Grade 8 and pre-geometry skills by the end of Grade 9, as measured by local, state and national assessment instruments.
- Imperative 5: Social Studies and Science - district passing rate for social studies and science will meet or exceed state performance levels in all grades tested and among all student groups as measured by state assessment tests.
- Imperative 6: Limited English Proficient (LEP) Programs - LEP students entering a Bilingual program at kindergarten will transition into English instruction at the end of three years, reach the advanced level of English proficiency within four years and reach non-LEP status within five years.
- Imperative 7: Special Education - students in special education will be provided learning experiences designed to ensure improved academic performance and social skills as stipulated in their Individualized Education Plan (IEP).
- Imperative 8: Advanced Academic and Special Interest Programs - the number of students enrolled in honors, Pre-Advanced Placement, and Advanced Placement (AP) courses, taking AP examinations, and scoring 3 or higher will increase annually. The percentage of students being tested, as well as the mean district score on the verbal and mathematics components of the American College Testing (ACT) and Scholastic Aptitude Test (SAT) will meet or exceed state and national levels.
- Imperative 9: Student Management - student attendance and retention will be monitored and supported to ensure that district and state standards for attendance and dropouts are met and that all students meet high school completion/graduation requirements.
- Imperative 10: Safe and Secure Environment - all district campuses and facilities will provide a safe and secure environment that gives maximum support to student learning and development.
- Imperative 11: School/Community/Parent Relations and Involvement - all district personnel will work to forge a strong bond and working relationship with individuals and organizations throughout the community.
- Imperative 12: Implementation of Comprehensive Evaluation System - District/campus imperatives, programs, initiatives and strategies will incorporate a comprehensive evaluation system.

The Strategic Plan also lists nine proposed supporting imperatives, but there are no specific goals identified in the strategic plan. The DEIP contains annual goals and timetables for these supporting imperatives.

- Instructional Leadership
- Curriculum and Instruction
- Early Childhood Education
- Career and Technology Education (Vocational Education)
- Adult Education and GED
- Technology (Instructional and Management)
- Student Support Services
- Human Resources
- Facilities

FWISD's planning emphasis is appropriately weighted on instruction, but should not ignore non-instructional areas. This has led to substandard performance and the lack of accountability in some non-instructional areas.

A model strategic planning process used by Fort Bend ISD (FBISD) includes goal setting in non-instructional areas. This planning includes in-depth diagnosis and analysis of community input, critical action planning and the allocation of budget resources to specific goals and objectives. The Fort Bend ISD 2000-01 budget was developed based on priorities established in the *District Strategic Plan 2000-05*.

FBISD's *District Strategic Plan 2000-05*, using the Deming Cycle as its underlying foundation, was developed using a six-step process that included: (1) planning the plan, (2) situational analysis and diagnosis, (3) goal-setting, (4) action planning, (5) budgeting and (6) writing and publishing the plan. Each step contained discrete activities that culminated in a strategic plan containing goals and objectives. Input was obtained from various stakeholder groups including students, staff, parents and the community. The process was exhaustive and inclusive, with meticulous planning and execution by the district. FBISD's *District Improvement Plan 1996-2000* served as FBISD's strategic plan before the *District Strategic Plan 2000-05* was developed. Both plans used the six-step strategic planning process.

Exhibit 1-16 presents the chronology of the FBISD *District Strategic Plan 2000-05* with specific descriptions of each of the six steps and related activities.

Exhibit 1-16
FBISD District Strategic Plan 2000-05
Six-Step Strategic Planning Process

Steps and Timing	Activities
Step 1 - Plan the Plan September - November 1998	FBISD established planning teams to complete the strategic plan and identified their respective roles, determined timelines and developed task maps. Task maps are detailed and show the project title, starting date, target completion date and actual completion date. Task maps also list task force committee members, define the project objectives and project expected results. Discrete tasks are also listed with individual responsibility assignments, start dates, target completion dates, actual completion dates and an area for planning notes.
Step 2 - Situational Analysis and Diagnosis February 23, 1999 - February 25, 1999 March 9, 1999 Spring 1999 August 1999	FBISD conducted a series of community meetings, focus groups and surveys throughout the district to obtain stakeholder input at the outset of the planning process. These activities are considered district needs assessments and include specific sessions with students (February 23, 1999), district staff (February 25, 1999), parents and community members (March 9, 1999) and employee and parent satisfaction surveys (spring 1999). Additionally, during the situational analysis and diagnosis phase, FBISD cabinet members engaged in the planning process reviewed the Academic Excellence Indicator System Report (AEIS) and national, state and district priorities (August 1999) before the goal-setting phase.
Step 3 - Goal Setting April - November 1999	FBISD used information gathered from its stakeholders and analysis of AEIS data and related national, state and district priorities to establish the district's goals. The superintendent and cabinet reviewed these goals with the board for its input, shared the goals with stakeholders and refined them as appropriate.
Step 4 - Action Planning September 1999 - January 2000	FBISD administrators developed tactical plans to implement the strategic direction contemplated by the goals and objectives established during the goal-setting phase of the process. Action planning considers the interrelationships of time, money, human resource capabilities and efficiencies to ensure proper implementation. FBISD uses task maps as an integral component of its action planning.
Step 5 - Budgeting March - July 2000	FBISD allocated budget resources to the eight goals included in the <i>District Strategic Plan 2000-05</i> . Budget resources were allocated based on priorities established during the goal-setting and action-planning steps.
Step 6 - Writing.	FBISD wrote and published its strategic plan, thereby.

<p>Publishing and Sharing the Plan with Stakeholders January - July 2000</p>	<p>clarifying in writing the strategic plan and communicating to stakeholders the direction in which the district is headed to improve student achievement. After publishing the plan and sharing it with stakeholders, FBISD treats the plan as a "living document" through which it continuously monitors and reports the progress toward implementation with quarterly updates to the board and district stakeholders.</p>
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Source: FBISD District Strategic Plan 2000-05.

Through its six-step strategic planning process, FBISD developed a strategic plan containing a mission and vision, belief statements, and goals and objectives supported by detailed action plans in the form of project task maps containing implementation strategies, timelines and responsibility assignments. FBISD's goals are organized into five strategic areas. **Exhibit 1-17** presents FBISD's goals organized by strategic area.

Exhibit 1-17
FBISD District Strategic Plan 2000-05
District Goals by Strategic Area

Strategic Area	Goal
Instructional Strategy	<ul style="list-style-type: none"> • FBISD will promote and expect students to meet high standards of achievement consistent with the district's vision and mission. • FBISD will foster character development for students, which supports the expectations of our community.
Service Strategy	<ul style="list-style-type: none"> • FBISD will build community support through effective communications and stakeholder involvement.
Organization and Management Strategy	<ul style="list-style-type: none"> • FBISD will attract, develop and retain quality staff for all district jobs. • FBISD will accomplish its vision and mission through the effective assignment of all personnel.
Fiscal Strategy	<ul style="list-style-type: none"> • FBISD will accomplish its vision and mission in a way that is fiscally responsible to all stakeholders.

Research and Development Strategy	<ul style="list-style-type: none"> • FBISD will collect, process and analyze data and research findings to improve all aspects of the district. • FBISD will foster creativity and innovation throughout the district.
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Source: FBISD District Strategic Plan 2000-05.

As shown above, FBISD chose to narrow its strategic focus to eight goals as a result of its exhaustive strategic planning process. Each of these goals is accompanied by specific objectives that will be implemented to ensure that they are achieved. For example, the second goal under the district's organization and management strategy, to accomplish its vision and mission through effective assignment of all personnel, will be accomplished by implementing the following objectives:

- Develop a framework for appropriate and efficient campus schedules.
- Systematically examine the roles, responsibilities and work schedules for all district personnel.
- Improve staff effectiveness through the use of stakeholder feedback, training and resources.
- Improve the criteria, process and timeline for staff allocation.

FBISD's model six-step strategic planning process refines a potentially voluminous strategic plan into a manageable document that focuses on specific goals and objectives fashioned from districtwide stakeholder input. The superintendent and members of his cabinet will present quarterly updates to the board and district stakeholders detailing FBISD's progress toward implementing the plan.

Recommendation 11:

Expand the scope of the Strategic Plan and DEIP to include more non-instructional areas.

Using a model similar to Fort Bend ISD, the district should expand the Strategic Plan beyond a one-page pamphlet and address specifically how goals will be reached. Non-instructional areas should be elevated from "proposed supporting imperatives" and become fully incorporated into the district's planning efforts. The board and administration should approach and measure progress towards non-instructional goals as it does instructional goals.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board considers reconvening the Strategic Plan development committee into a District Advisory Committee or establishes a new District Advisory Committee.	June 2001
2.	Board members, the District Advisory Committee and the superintendent review the Fort Bend ISD model.	June 2001
3.	The board asks the District Advisory Committee and the superintendent to draft specific goals for non-instructional areas and implementation steps for the Strategic Plan.	June 2001
4.	The superintendent asks department heads to work with their staff to develop realistic goals and implementation steps.	July 2001
5.	The District Advisory Committee and the superintendent propose specific goals for non-instructional areas and implementation steps to the board.	September 2001
6.	The board adopts goals for non-instructional areas and implementation steps and incorporates them into the next Strategic Plan.	October 2001

FISCAL IMPACT

This recommendation could be accomplished with existing resources.

FINDING

The district is effective in using performance measures in instructional areas, but does not use performance measures to evaluate non-instructional departments. The DEIP addresses the non-instructional areas of Technology, Facilities and Human Resources to a very limited extent, but the district does not apply the planning and evaluation methodology that it uses for instruction to non-instructional areas.

The district's lack of performance measures in non-instructional areas prevent management and the board from evaluating how well these areas are doing. The district cannot evaluate whether certain functions would be better accomplished by outsourcing them to entities outside the district when the district's in-house departments are not being held accountable.

As an extension of the state accountability system, some Texas school districts are developing their own accountability systems to improve efficiency and effectiveness. Examples of non-instructional performance measures are presented in **Exhibit 1-18**.

Exhibit 1-18
Examples of Non-Instructional Performance Measures, by Functional Area

Functional Area	Performance Measure (Trend and Peer Comparisons)
Human Resources	Ratio of total students to total staff Ratio of employees to human resources staff Ratio of acceptances to total job offers made Turnover ratios, by class of employee, and by school Number of vacant positions at end of month, by department and by school
Facilities Management	Number of square feet per custodian, by school Custodial cost per square foot Maintenance cost per square foot, by trade, by school Energy cost per square foot, by type, by school Number of square feet per student, by school
Technology	Ratio of students to instructional computers Ratio of administrators to administrative computers Ratio of total computers to technical support Ratio of total computers to help desk support Number of computers more than five years old
Food Services	Meals per labor hour, by school Food cost per meal, by school Meal participation rates, by school Profitability by school, after indirect cost allocation
Transportation	Cost per mile, by program Cost per rider, by program Number of miles per student, by program Maintenance cost per bus Ridership, by program, by school Bus Utilization, by program Average bus age Linear density
Safety and Security	Number of incidents reported, by type, by school Security cost per student, by school
Purchasing	Average dollar amount per purchase order Ratio of purchase orders processed per month to purchasing staff
Accounting	Ratio of number of operating account check per month to accounts payable staff

Source: Gibson Consulting Group Inc.

Recommendation 12:

Develop additional performance measures to evaluate the district's performance, particularly for non-instructional areas.

The district should develop performance measures and establish targets and timetables for each measure. The measures should be included in district planning and assessment documents, and be incorporated into performance evaluations of senior administrators.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent works with executive staff to identify what performance measures are appropriate in each department.	June 2001
2.	The board approves performance measures for each department.	August 2001
3.	The performance measures are published and disseminated to all employees.	August 2001
4.	The superintendent annually reviews each department's progress toward its performance measures and reports this progress to the board and community.	Annually thereafter

FISCAL IMPACT

This recommendation could be implemented with existing resources.

Chapter 2

EDUCATIONAL SERVICE DELIVERY

This chapter discusses the Fort Worth Independent School District's (FWISD's) educational service delivery system and student performance measures in nine sections:

- A. Student Performance
- B. Instructional Resources
- C. Dropout Prevention/Counseling/Alternative Schools
- D. Compensatory Programs
- E. Advanced Academic Services
- F. Special Education Program
- G. Bilingual Education Program
- H. Career and Technology Education Program
- I. Health and Wellness Services

Effective educational service delivery requires appropriate instructional guidance, capable teachers, adequate resources and a thorough understanding of students' instructional needs. Well-designed and implemented instructional programs are essential to meet the needs of all students in FWISD. Instructional leadership from FWISD's central office and leadership at each school and classroom are directly responsible for these programs' effectiveness.

BACKGROUND

FWISD selected four Texas school districts to serve as the peer districts for comparative purposes during this review: Austin, Dallas, El Paso and Houston. The Texas Education Agency (TEA) provided information on the state-mandated student achievement test scores, the Texas Assessment of Academic Skills (TAAS) and other student performance measures, such as the Scholastic Aptitude Test (SAT) and the ACT Assessment.

Demographic, staffing and financial data for each school district and school are reported in TEA's Academic Excellence Indicator System (AEIS) reports. These reports are sent to each school and district and are available on TEA's web site (www.tea.state.tx.us). The latest AEIS data published by TEA in November 2000 are for 1999-2000.

Exhibit 2-1 presents demographic information for FWISD, the selected peer districts, Regional Education Service Center 11 (Region 11) and the state.

Exhibit 2-1
Demographic Characteristics of FWISD
and Peer School Districts
1999-2000

District	Student Enrollment		Ethnic Groups				Eco-Disadvantaged	
	Number	5 Year Percent Change*	Percent African American	Percent Hispanic	Percent Anglo	Percent Other	Percent Minority	Percent Eco-Disadvantaged*
Houston	209,716	1.0%	33.0%	54.1%	10.0%	2.9%	90.0%	75.4%
Dallas	160,477	8.0%	37.6%	52.0%	8.5%	1.9%	91.5%	73.4%
Fort Worth	78,654	6.0%	31.7%	43.0%	22.8%	2.5%	77.2%	58.0%
Austin	77,723	4.0%	16.7%	45.8%	34.8%	2.8%	65.2%	46.8%
El Paso	62,306	-3.0%	4.8%	77.3%	16.5%	1.5%	83.5%	66.3%
Region 11	402,161	12.8%	12.8%	19.9%	63.5%	3.7%	36.5%	32.3%
State	3,991,783	6.7%	14.4%	39.6%	43.1%	2.9%	56.9%	49.0%

Source: 1999-2000 TEA Academic Excellence Indicator System (AEIS) Reports.

**Percent Change is defined as 1999-2000 values minus 1995-96 values divided by 1995-96 values.*

For 1999-2000, FWISD's enrollment was 78,654. Austin ISD is closest in size to FWISD, with a student enrollment of 77,723. FWISD enrollment increased from 1995-96 through 1999-2000 by 6 percent. Only one peer school district, El Paso ISD, had a declining enrollment from 1995-96 to 1999-2000. Dallas and Austin have experienced increases in student enrollment similar to Fort Worth and the state. Minority student enrollment in these districts ranges from 91.5 percent in Dallas to 65.2 percent in Austin. FWISD has the second lowest percentage (77.2 percent) of minority student enrollment.

FWISD has the second lowest percentage of economically disadvantaged students among the four peer districts (58 percent). Houston has the highest percentage of economically disadvantaged students (75.4 percent),

followed by Dallas (73.4 percent), El Paso (66.3 percent) and Austin (46.8 percent.)

Exhibit 2-2 shows that the range of 1999-2000 property values per student (\$130,895-\$379,266) varies significantly among the peer districts. FWISD's property value per student (\$166,169) is lower than the state average of \$198,090 and ranks fourth among its peer districts. Compared to the peer districts, FWISD has the second highest maintenance and operations (M&O) standardized tax rate (\$1.395) for 2000. FWISD's M&O tax rate is slightly higher than the state average of \$1.358. All districts had an increase in their M&O tax rates. FWISD and El Paso ISD had a decline in their interest and sinking fund tax rates.

Exhibit 2-2
Property Value per Student and Standardized Tax Rates
1996 and 2000*

		Standardized Tax Rate			
		1996		2000	
District	Value/ Student (2000)	M&O**	Interest & Sinking Fund	M&O**	Interest & Sinking Fund
Austin	\$379,266	\$1.131	\$0.151	\$1.385	\$0.160
Dallas	\$295,268	\$1.256	\$0.082	\$1.367	\$0.086
Houston	\$253,134	\$1.176	\$0.117	\$1.254	\$0.119
Fort Worth	\$166,169	\$1.314	\$0.140	\$1.395	\$0.119
El Paso	\$130,895	\$1.233	\$0.291	\$1.452	\$0.111
Region 11	\$227,547	\$1.176	\$0.203	\$1.306	\$0.199
State	\$198,090	\$1.236	\$0.176	\$1.358	\$0.153

Source: 1995-1996, 1999-2000 TEA AEIS Reports.

**Maintenance and Operations + Interest and Sinking Fund = Total Tax Rate*

***Maintenance and Operations.*

The number of FWISD students enrolled per grade level is provided in **Exhibit 2-3**. There are a larger number of students in grade nine than in

other secondary grades. This pattern is common among most school districts in Texas because a large number of students in grade nine do not obtain enough credits to be categorized as tenth graders.

Exhibit 2-3
Number and Percent of FWISD Students Enrolled by Grade Level
1999-2000

Grade Level	Number of Students	Percent
Early Childhood Education	170	0.2%
Pre-Kindergarten	2,924	3.7%
Kindergarten	6,498	8.3%
Grade 1	6,717	8.5%
Grade 2	6,586	8.4%
Grade 3	6,570	8.4%
Grade 4	6,307	8.0%
Grade 5	6,223	7.9%
Grade 6	5,961	7.6%
Grade 7	5,851	7.4%
Grade 8	5,524	7.0%
Grade 9	6,664	8.5%
Grade 10	4,868	6.2%
Grade 11	4,027	5.1%
Grade 12	3,764	4.8%
Total	78,654	

Source: 1999-2000 TEA AEIS Reports.

As shown in **Exhibit 2-4**, FWISD ranks fourth in instructional expenditures per student (state and local funds only) compared to the peer districts. Only El Paso ISD spends less per student. Approximately 68 percent of FWISD's instructional expenditures are directed to regular education. This percentage is average, compared to the state and to the peer districts. The 1999-2000 AEIS reports show that there are differences among the expenditure patterns across the peer districts and FWISD. For example, FWISD ranks first in the percentage of instructional

expenditures spent on gifted and talented education. El Paso ISD and FWISD rank next to last in the percentage of instructional expenditures allocated to their career and technology education programs. FWISD ranks fourth in the percentage of instructional expenditures allocated to special education.

Exhibit 2-4
Instructional Expenditures in FWISD and Peer Districts
1999-2000

District	Total Expenditures	Instructional Expenditures Per Student*	Percent Regular	Percent Bil/ESL	Percent Career Tech.	Percent Compen-satory	Percent Gifted & Talented	Percent Special Educ.
Austin	\$579,025,991	\$3,441	64.8%	8.5%	3.8%	4.6%	1.0%	17.3%
Houston	\$1,352,621,239	\$3,410	57.0%	15.0%	3.2%	8.7%	2.5%	13.6%
Dallas	\$991,397,992	\$3,425	72.2%	2.9%	4.1%	9.7%	2.0%	9.2%
Fort Worth	\$474,039,805	\$3,180	68.3%	5.9%	3.4%	7.6%	3.7%	11.1%
El Paso	\$374,417,425	\$3,154	65.9%	9.6%	3.4%	7.2%	0.8%	13.1%
Region 11	\$2,492,134,778	\$3,290	74.2%	3.0%	3.6%	4.8%	2.0%	12.4%
State	\$25,364,399,671	\$3,376	70.9%	3.9%	4.1%	6.8%	1.9%	12.4%

Source: 1999-2000 TEA AEIS Reports.

** Includes Instruction and Instructional Leadership.*

As seen in **Exhibit 2-5**, FWISD ranks fourth in the percentage of students identified as gifted and talented, but spends the highest percentage per student. In the spring 2000, however, the district implemented a new, more inclusive identification process. As a result of the new process, the fall 2000 PEIMS data submission indicates that the district identified 10.6 percent of its students as gifted and talented. Students not formally identified as gifted may participate in most FWISD gifted education program offerings, based on teacher recommendations, parental approval, student interest or classroom performance.

In 1999-2000, FWISD had 18.4 percent of students enrolled in career and technology education programs. The percentage of its students enrolled in bilingual or English as a Second Language (ESL) programs is similar to Houston ISD and El Paso ISD. Dallas ISD had the highest percentage, 31.5 percent, of students enrolled in bilingual/ESL education, and Austin ISD had the lowest percentage (15.2 percent). Compared to the peer

districts, FWISD ranks second highest in the percentage of students receiving special education services.

Exhibit 2-5
Student Enrollment by Program
1999-2000

District	Percent Bilingual / ESL	Percent Career & Technology	Percent Gifted & Talented	Percent Special Education
Austin	15.2%	14.5%	8.8%	12.3%
Dallas	31.5%	18.0%	20.0%	8.7%
Fort Worth	23.7%	18.4%	6.9%	11.0%
Houston	23.8%	16.9%	9.7%	10.4%
El Paso	23.4%	17.3%	6.4%	9.1%
Region 11	9.0%	17.9%	9.1%	12.0%
State	12.5%	18.6%	8.4%	12.1%

Source: 1999-2000 TEA AEIS Reports.

Exhibit 2-6 shows the percentage of expenditures by function for FWISD and the peer districts. Expenditures by function are expressed as a percent of total operating expenditures. Overall instruction includes all activities dealing directly with the interaction between teachers and students, including instruction aided with computers and expenditures to provide resources for Juvenile Justice Alternative Education Programs.

Instructional-related services include expenditures for educational resources and media, such as resource centers and libraries, curriculum development and instructional staff development. FWISD has the third highest expenditures for overall instruction and the highest percentage of expenditures for instructional-related services compared to the peer districts.

In addition, support services for students are higher in FWISD than all of the peer districts and the state average. Expenditures for plant maintenance and security are higher than the peer districts and the state average, yet the total per pupil expenditures are less than all but El Paso. In four categories-instructional-related services, support services for students, plant maintenance and operations where FWISD is tied with Dallas ISD, and security and monitoring services-FWISD has a higher percentage of expenditures compared to the state average and the peer districts.

Exhibit 2-6
Percentage of Total Budgeted Expenditures by Function
FWISD and Peer Districts
1999-2000

Expenditure Category	Fort Worth	Austin	Dallas	Houston	El Paso	State Average
Instruction	50.9%	44.9%	58.8%	51.8%	50.4%	51.7%
Instructional-Related Services	3.6%	1.8%	2.9%	3.3%	3.0%	2.6%
Instructional Leadership	1.9%	1.2%	1.6%	1.1%	2.1%	1.2%
School Leadership	5.7%	5.4%	5.6%	6.6%	5.6%	5.2%
Support Services - Student	5.2%	2.7%	4.6%	4.3%	4.3%	4.0%
Student Transportation	2.5%	3.1%	0.4%	2.5%	2.2%	2.4%
Food Services	4.6%	5.0%	5.3%	4.9%	4.8%	4.8%
Cocurricular/ Extracurricular	1.4%	0.7%	0.9%	0.7%	1.8%	2.3%
Central Administration	2.3%	2.6%	2.7%	3.0%	3.4%	3.5%
Plant Maintenance and Operations	10.9%	7.4%	10.9%	10.3%	8.6%	9.6%
Security and Monitoring Services	1.6%	0.6%	0.8%	0.9%	0.5%	0.5%
Data Processing Services	0.8%	1.0%	1.9%	1.5%	0.9%	1.0%
Other*	8.7%	23.5%	8.3%	9.1%	12.5%	11.2%
Per Pupil Expenditures	\$6,027	\$7,450	\$6,178	\$6,450	\$6,009	\$6,354

Source: 1999-2000 TEA AEIS Reports.

** Includes any other operating expenditures not listed above and all non-*

operational expenditures such as debt service, capital outlay, and community and parental involvement services.

Exhibit 2-7 shows the percentage of professional staff in various categories. Compared to the peer districts, FWISD has the lowest percentage of ethnic minority teachers. FWISD and El Paso have the lowest percentage of teachers compared to the peer districts, but both are within the average for the peer districts and the state. FWISD has a slightly higher percentage in school administration and central administration than the peer districts. Compared to the peer districts, FWISD ranks fourth in the percentage of professional support staff, but is slightly higher than the state average of 7.3 percent.

**Exhibit 2-7
Professional Staff
FWISD and Peer Districts
1999-2000**

Professional Staff	Fort Worth	Austin	Dallas	El Paso	Houston	State Average
Teachers	50.4%	53.4%	53.9%	49.1%	50.5%	51.3%
Professional Support	8.9%	7.4%	9.8%	9.6%	11.4%	7.3%
School Administration	3.1%	2.8%	2.6%	2.7%	2.4%	2.6%
Central Administration	0.7%	0.5%	0.3%	0.3%	0.6%	0.9%
Educational Aides	8.2%	6.7%	8.2%	8.7%	8.8%	10.3%
Auxiliary Staff	28.7%	30.0%	25.1%	29.7%	26.3%	27.6%
Percent Minority Teachers	34.5%	44.1%	54.5%	51.8%	61.7%	26.1%

Source: 1999-2000 TEA AEIS Reports.

Exhibit 2-8 shows teacher experience and turnover rates for FWISD and the peer districts. With the exception of Dallas ISD, FWISD has a lower turnover rate than its peer districts. The percentage of beginning teachers in FWISD is similar to Austin and Dallas and is higher than the state average of 7.6 percent. Compared to the peer districts and the state, FWISD has the lowest percentage of teachers with more than 20 years of teaching experience.

Exhibit 2-8
Teacher Experience and Turnover Rate
FWISD and Peer Districts
1999-2000

	Fort Worth	Austin	Dallas	Houston	El Paso	State Average
Beginning Teachers	9.1%	9.1%	9.7%	12.5%	5.3%	7.6%
1-5 Years Experience	30.6%	28.9%	28.6%	24.3%	22.1%	27.0%
6-10 Years Experience	16.9%	16.2%	12.5%	15.6%	19.5%	17.9%
11-20 Years Experience	23.0%	24.8%	21.6%	24.0%	29.0%	26.2%
Over 20 Years Experience	20.4%	21.0%	27.6%	23.7%	24.1%	21.2%
Average Years Experience (total)	11.3	11.2	13.1	12.3	13.0	11.9
Average Years Experience with district	8.5	8.2	9.9	10.3	10.7	8.0
Turnover Rate	14.0%	15.9%	13.0%	15.9%	16.5%	15.0%

Source: 1999-2000 TEA AEIS Reports.

FWISD has the second lowest percentage of teachers with no degree compared to the peer districts and the state (**Exhibit 2-9**). Fort Worth is average compared to the peer districts and the state in the percentage of teachers with a master's degree. FWISD ranks fourth highest compared to the peer districts in the percentage of teachers with a doctoral degree; however, FWISD's percentage of teachers with doctorates is equal to the state average of 0.5 percent.

Exhibit 2-9
Teacher Degrees
FWISD and Peer Districts
1999-2000

	Austin	Fort Worth	Dallas	Houston	El Paso	State Average
No Degree	0.1%	0.8%	1.3%	5.2%	1.9%	1.2%
Bachelor	71.8%	74.0%	65.8%	63.7%	76.4%	74.1%

Master	27.5%	24.7%	31.4%	29.6%	21.4%	24.3%
Doctorate	0.6%	0.5%	1.6%	1.4%	0.3%	0.5%

Source: 1999-2000 TEA AEIS Reports.

Under the state accountability system, TEA assigns annual ratings to each district and school based upon: (1) TAAS scores, (2) attendance, (3) dropout rates and (4) data quality. The state accountability system includes five ratings for districts:

- Exemplary,
- Recognized,
- Academically Acceptable,
- Academically Unacceptable and
- Unacceptable: Data Quality.

In 1999, TEA added two new rating categories: Unacceptable: Data Quality, a district-level rating, and Unacceptable: Data Issues, a school-level rating. These two rating categories are assigned to certain districts and schools when serious data reporting errors affect one or more of the base indicators used to determine accountability ratings.

Schools or districts are assigned this rating if their data errors are of such magnitude that the results are deemed unsuitable for ratings purposes. The Unacceptable: Data Quality rating can be assigned in cases where districts acknowledge that their data accuracy is seriously compromised or where a TEA investigation reveals that significant reporting errors have occurred.

Exhibit 2-10 presents a summary of the ratings that can be applied to schools and districts.

Exhibit 2-10
TEA Accountability Ratings
1999-2000

Rating	Applicability/Explanation
Exemplary	District and school
Recognized	District and school
Academically Acceptable	District
Acceptable	School
Academically Unacceptable	District

Low-Performing	School
Alternative Education (AE): Acceptable, AE: Needs Peer Review, or AE: Not Rated	Schools that applied and were identified as eligible to be evaluated under alternative education procedures.
Charter School	At the district level, open-enrollment charter schools receive the label Charter School. At the school level, they are given one of the four school ratings listed above, based on the regular accountability system. First-year charter schools are not rated.
Not rated	These schools include those that do not serve students within the grade 1 to grade 12 span, such as pre-kindergarten centers and early education through kindergarten schools.
Unacceptable: Special Accreditation Investigation	Districts that have undergone an investigation as mandated in Chapter 39 of the Texas Education code.
Unacceptable: Data Quality (District) Unacceptable: Data Issues (School)	Serious errors in data reporting that affected one or more of the base indicators used to determine accountability ratings. The errors were of such magnitude that the results were deemed unsuitable for ratings purposes.

Source: Texas Education Agency, Accountability Manual, 2000.

To receive an Exemplary rating, at least 90 percent of all students, as well as 90 percent of African American, Hispanic, Anglo and Economically Disadvantaged students, must pass the TAAS reading, writing and mathematics tests.

To achieve a Recognized rating, 80 percent of all students and each student group must pass the TAAS reading, writing and mathematics tests.

In the 2000-01 school year, to be rated Academically Acceptable, 50 percent of each student group must pass TAAS. Beginning in 2000-01, scores for students with disabilities and results from the TAAS Spanish version of reading and mathematics in grades 3 through 6 are included in the state's accountability calculations. A district is rated Academically Unacceptable (or Low-performing at the school level) if less than 50 percent of students passed TAAS. Although the state accountability system also considers attendance and dropout rates, TAAS is the primary determining factor in state accountability ratings. According to TEA,

failure to meet TAAS standards is the primary reason that a school is rated low-performing.

FWISD was rated as Acceptable in the state accountability system from 1996 through 2000 (**Exhibit 2-11**). With the exception of Austin ISD in 1999, the peer districts have also been regularly rated as Acceptable.

Exhibit 2-11
Accountability Ratings
FWISD and Peer Districts
1995-1996 through 1999-2000

	1996	1997	1998	1999	2000
Austin	Acceptable	Acceptable	Acceptable	Unacceptable-Data Quality	Acceptable
Dallas	Acceptable	Acceptable	Acceptable	Acceptable	Acceptable
El Paso	Acceptable	Acceptable	Acceptable	Acceptable	Acceptable
Fort Worth	Acceptable	Acceptable	Acceptable	Acceptable	Acceptable
Houston	Acceptable	Acceptable	Acceptable	Acceptable	Acceptable

Source: TEA Accountability Reports 1995-96 through 1999-2000.

FWISD has 113 schools that were included in the 1999-2000 state accountability rating system. Five of these campuses were alternative education schools. Of the 108 regular education campuses, eight schools (all elementary) received an exemplary rating, 24 schools received a recognized rating, 71 schools received an acceptable rating and 5 schools received a low-performing rating. **Exhibit 2-12** provides a list of the eight elementary campuses that received an exemplary rating. Three of the five low-performing regular education schools were previously rated under the Alternative Education Accountability System for specialized or alternative schools.

In 1999-2000, FWISD had five alternative education schools rated under the state's alternative education accountability system. Of these five campuses, four were rated Alternative Education Acceptable and one was rated Alternative Education Needs Peer Review. In 1999-2000, TEA rated three additional alternative education schools, the Detention Center, Homebound School, and Horizon Middle School (alternative education middle school), as low-performing after several years of being rated under the Alternative Accountability System. An examination of the Horizon Middle School and Detention Center students' performance, however,

shows these two schools are within the TEA performance parameters that would result in an Alternative Education Acceptable rating.

There appears to be a question as to which accountability system several of Fort Worth's campuses should be included. According to a December 18, 1999 letter from the commissioner of education, disciplinary alternative education programs (DAEPs) such as the district's Horizon Middle School and Detention Center should be evaluated under the state's alternative accountability system. However, these campuses are currently rated under the state's traditional accountability system. Central office administrators said they are aware of this issue and action will be taken to ensure that these schools are rated under the appropriate accountability system in the future.

Excluding the three alternative education campuses that were included in the traditional accountability system, two regular education middle schools, Meacham and Handley, were rated low-performing in 2000. In both cases, less than 50 percent of these schools' economically disadvantaged students passed the TAAS (grades 3-8 and 10 combined). Meacham Middle School, however, missed being rated acceptable by less than one percentage point and Handley Middle School by 1.1 percentage point. Neither of these schools was rated low-performing in 1996 through 1999.

Exhibit 2-12 shows the eight elementary campuses that were rated exemplary by TEA. The number of exemplary schools in FWISD has increased from two in 1996 to eight in 2000. Statewide and in the peer districts, the number of exemplary schools has also increased since 1996.

Exhibit 2-12
FWISD Schools Rated as Exemplary
1995-1996 and 1999-2000

1995-96	1999-2000
Tanglewood Elementary	Tanglewood Elementary
Waverly Park Elementary	Waverly Park Elementary
	Benbrook Elementary
	Burton Hill Elementary
	Maude I Logan Elementary
	Westcreek Elementary
	J. T. Stevens Elementary

	Westpark Elementary
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Source: TEA AEIS Reports (1994-95 and 1998-99).

In 1995-96, 7.7 percent of FWISD schools were rated either Exemplary or Recognized, compared to 26.8 percent of schools statewide. In 1999-2000, 29.6 percent of FWISD schools, compared to 47.9 percent of schools statewide were rated Exemplary or Recognized (**Exhibit 2-13**). Compared to the peer districts, FWISD was the second highest in the percentage of schools rated Exemplary or Recognized.

Exhibit 2-13
Distribution of Campus Accountability Ratings
FWISD, Peer Districts and State*
1995-96 and 1999-2000

1995-96 Ratings					
	Exemplary	Recognized	Acceptable	Low-performing	Total Number
Houston	5.8%	23.2%	62.5%	3.5%	246
Austin	5.4%	8.6%	72.0%	11.8%	91
ElPaso	3.8%	10.1%	81.0%	0.0%	75
Fort Worth	1.8%	5.9%	80.0%	4.5%	102
Dallas	1.0%	8.0%	84.8%	1.5%	187
State	6.2%	20.6%	64.9%	1.7%	5,938
1999-2000 Ratings					
	Exemplary	Recognized	Acceptable	Low-performing	Total Number
Austin	10.0%	9.0%	69.0%	9.0%	97
Fort Worth	7.4%	22.2%	65.7%	4.6%	108
ElPaso	6.1%	20.7%	69.5%	0.0%	79
Houston	3.9%	27.0%	58.7%	6.0%	270
Dallas	3.7%	7.4%	73.0%	13.0%	209
State	18.8%	29.1%	42.2%	2.1%	6,903

Source: 1999 Accountability Reports, TEA Performance Reporting Web Site.

** Accountability ratings of "Not Rated" and "Alternative Education"(AE) are not included for comparability purposes. Ratings for charter schools are not included. Percentages do not add to 100 because AE and charter school ratings are not included.*

Chapter 2

EDUCATIONAL SERVICE DELIVERY

A. Student Performance (Part 1)

TAAS performance, the primary factor in determining a district's accountability rating, is based on effective classroom instruction. Effective classroom instruction depends upon appropriate human and fiscal resources and support from the district's central office. The school district administrative and instructional team must be qualified and active in planning and implementing the curriculum.

The state-mandated TAAS tests are administered in grades 3-8 and 10. These assessments currently include a reading and mathematics test in grades 3-8 and 10, and a writing assessment in grades 4, 8 and 10. Science and social studies tests are administered at grade 8. The Spanish version of TAAS is offered in grades 3-6. Also included in the student assessment system are end-of-course examinations in Algebra I in grades 7-12, Biology I in grades 8-12, English II and United States History.

Between 2000-2003, incremental changes will be made to the TAAS administration schedule, particularly at the high school level. By 2003, TAAS will be administered in grades 9, 10 and 11. Reading and mathematics tests will be added at grade 9. The exit-level examination will be moved to grade 11 and will include science, social studies, English language arts and mathematics. A science test will be added to grade 5.

Between 1995 and 2000, TAAS scores improved in FWISD, Region 11 and the state (**Exhibit 2-14**). In 1995-96, FWISD had the fourth lowest percentage of students passing all TAAS tests taken compared to the peer districts. During this five-year period, the percentage of FWISD students passing all TAAS tests taken improved by 18.8 percentage points, the highest percentage change from 1996 through 2000. The percentage of students passing all tests taken is very similar in the Fort Worth, Houston, Austin and El Paso school districts. Region 11's and the state's percentage of students passing all TAAS tests taken is approximately ten percentage points higher than Fort Worth and the peer districts.

Exhibit 2-14
Percentage of Students Passing TAAS, All Tests Taken
Sum of Grades 3-8 and 10
(1995-96 through 1999-2000)

District	1995-1996	1995-1996	1996-1997	1997-1998*	1998-1999**	1999-2000**	Percentage Point
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	Rank						Difference from 1996 to 2000
Austin	2	58.8%	65.5%	63.7%	67.6%	71.2%	12.4%
Dallas	5	50.8%	54.5%	57.8%	60.8%	59.9%	9.1%
Fort Worth	4	51.6%	57.0%	60.5%	66.9%	70.4%	18.8%
Houston	3	57.3%	63.9%	66.7%	63.7%	70.3%	13.0%
El Paso	1	60.0%	65.5%	63.8%	68.6%	70.7%	10.7%
Region 11		70.8%	76.2%	76.0%	78.1%	80.6%	17.3%
State		67.1%	73.2%	73.1%	78.1%	79.9%	12.8%

Source: 1999-2000 TEA AEIS Reports.

** Recalculated from original posting to include special education.*

*** Recalculated scores to include year 2000 accountability criteria.*

Student performance on all TAAS tests taken includes the reading, writing and mathematics sections of the tests. At grade 8, "all tests taken" includes a science and social studies test. Science and social studies tests are not included in determining district and campus accountability ratings. This normally means that because there are five TAAS tests (mathematics, reading, writing, science and social studies) administered in grade 8, this grade level typically has the lowest percentage of students passing all tests taken.

FINDING

FWISD has implemented a strategic plan to improve student performance, and the superintendent and central administrators provided instructional leadership to implement the improvements in the plan. In November 1998, the Board of Trustees approved the strategic plan. Specific initiatives and program enhancements from this plan are listed in **Exhibit 2-15**.

Exhibit 2-15 FWISD Strategic Plan Initiatives and Program Enhancements November 1998

Highlights from Strategic Plan
We will continue and attempt to improve the early literacy initiative (PreK - 2).

the elementary reading initiative (Grades 3-5), the elementary math specialist initiative, the bilingual initiative, the tutorial initiative and the elementary school initiative (for high needs students to attend 200 days of school per year).
We will enhance middle school reading, high school reading and secondary mathematics.
We will consider reconstituting some secondary schools to substantially modify the school culture in order to increase achievement.
We will add 22 instructional support team members to positively impact achievement in approximately 10 additional schools.
We will develop a link between schools and childcare providers.
We will enhance our social services component for counseling, parenting education and health.
We will strengthen our preparatory programs designed to increase the likelihood of student success in high academic high school offerings (implementing High Academic Program at elementary and increasing honors courses at middle school level).
We will strengthen our high school advanced academic offerings across the entire district.
We are preparing more AP teachers than ever before and will continue to do so.
We will offer core and advanced courses guaranteed in each high school.
We will move in the direction of having honors/high academic/preparatory teachers' instruction include regular courses for part of the day and/or otherwise increase contact with students and teachers in the regular program.
We will infuse more multicultural materials into courses. This will further intensify as we adopt books that are far more representative of diverse cultures than has been the case in the past.
We will use faculty meetings for ongoing cultural sensitivity training.
We will infuse conflict resolution into the school curriculum.
We will attempt to reduce teacher/pupil ratios in core courses in those schools experiencing academic performance difficulties. This will be done directly and indirectly by utilizing a variety of non-traditional methods (e.g., hiring teachers in training to assist regular teachers, hiring part-time teachers/rearrangement of instructional periods).
We will retain an outside gifted and/or psychometric expert to modify program entrance requirements, using a variety of factors in order to identify more students capable of succeeding in the programs.
The administration will work on a regular basis with community based support

committees designed to monitor overall implementation of academic initiatives including district research and evaluation reviews of district performance outcomes.

Our statistical/evaluation analyses will be targeted to address student outcomes districtwide with the goal of eliminating achievement disparities between and among racial/ethnic groups.

Source: FWISD Strategic Action Plan, November 1998.

Elements of the district's strategic plan have been implemented. The District Educational Improvement Plan (DEIP) further defines district imperatives for 2000-01. During interviews and focus groups, FWISD administrators repeatedly praised the instructional leadership in the district. Administrators reported that the superintendent supports their efforts and provides leadership to ensure that planned initiatives are enacted. The superintendent regularly interacts with school administrators and teaching staff to explain expectations for district initiatives. School personnel including principals, assistant principals, teachers and counselors praised central administrators' open communication and reliable support. School administrators said the Operations Department supported them and met their needs efficiently. Teachers and school administrators reported the Curriculum Department and Instructional Support Team members, which are discussed in the following finding, provide instructional assistance and promote cross-departmental communication on curricular and instructional issues.

COMMENDATION

FWISD has adopted a strategic plan to improve student performance, and the Board of Trustees, superintendent and central office administrators provide instructional leadership and resources to ensure that all students achieve academic success.

FINDING

FWISD's Instructional Support Teams (ISTs) provide school-level training, coaching and support to improve classroom instruction and student learning. ISTs serve two geographic areas of FWISD. Area I includes the northeast and south quadrants of the district, and Area II includes the northwest and central quadrants. Each team is under an associate superintendent and headed by an executive director. Team members are skilled instructors who provide expertise, training and coaching in all curricular areas, as well as program areas such as early childhood education; Title I of the Elementary and Secondary Education Act, as amended; gifted and talented education; and special education.

The support team members interviewed refer to themselves as "teachers on special assignment." Principals and teachers interviewed reported that ISTs are visible in schools, provide high-quality support and actively identify and meet instructional needs of professional staff members. ISTs conduct training for new and veteran teachers, teach demonstration lessons, consult on developing school improvement plans and respond to instructional needs.

In an effort to improve communication among ISTs, curriculum content councils were re-established in September 2000. These councils include team members from each subject and geographic area. The council meetings are held on the first and third Friday of each month. The first Friday is designated for the core academic content areas (English Language Arts, Mathematics, Science and Social Studies) while the focus of the third Friday is on special program areas such as Bilingual Education, Advanced Academic Services and Special Education. The Early Childhood Curriculum Content Council meets on the second Friday of each month.

The objectives of the ISTs are to collaborate with and support principals as instructional leaders; help identify schools' instructional needs; help implement strategies to address those needs; and provide a consistent approach to curriculum and instruction through the curriculum content councils.

According to the district's January 2000 Status Report to the Board of Trustees, ISTs provide the following support services:

- Help develop the Campus Educational Improvement Plan (CEIP).
- Participate on Site-Based Decision-Making (SBDM) teams.
- Work with Alternative Certification Program (ACP) candidates.
- Provide technical assistance and support to teachers and building administrators.
- Participate in curriculum content council activities.
- Assist in developing instructional strategies to achieve district and campus goals and objectives.
- Support appropriate teaching practices to improve student achievement.
- Demonstrate instructional strategies as needed.
- Analyze school-level data and its use to improve instruction.
- Assist school personnel in the evaluation, selection and use of instructional materials, including test preparation materials.
- Plan for, conduct and follow up with school and district-level professional development activities.
- Assist school personnel in the integration and coordination of special instructional programs (for example, Bilingual/ESL,

Special Education, Advanced Academic Services, Teacher Assistance and Guidance Program, and Districtwide Tutoring Initiative Program).

- Recommend consultants, specialists and other resources that support professional development activities.
- Help new teachers.
- Monitor classroom instruction.
- Implement district initiatives.

The teams support all FWISD schools, but focus on schools identified as low-performing or acceptable in the state accountability system. FWISD's Department of Research and Evaluation evaluates the ISTs annually. The conclusions and recommendations of the 1999-2000 evaluation report were generally positive and showed that team members improved communication with district personnel and made efforts to more clearly define their roles. Teachers reported the ISTs had a positive effect on student achievement.

As part of the ISTs' focus on low-performing and acceptable schools, team members help schools review test data and create mini-plans for improving student achievement. The mini-plans include key strategies, desired outcomes, evaluation criteria, sequential action steps, persons responsible for each step, resources needed and timelines for accomplishing the steps.

The team members also help staff identify areas of weakness and trends at each school such as changing demographics, teacher turnover rates, excessive disciplinary infractions and longitudinal weaknesses in TAAS data. In secondary schools, the teams help staff review the feeder school data to detect trends. Once a mini-plan has been developed, follow-up meetings are held to help schools meet their critical needs.

COMMENDATION

Instructional Support Teams of highly skilled teachers help schools improve student performance.

FINDING

FWISD's TAAS scores are lower than Region 11 and the state. **Exhibit 2-16** shows that in 2000, the percentage of students in FWISD passing all TAAS tests taken in grades 3, 4, 5 and 6 is 7 to 12 percentage points lower than Region 11 and the state. This discrepancy in TAAS performance increases in grades 7, 8 and 10. The percentage of students in FWISD passing all TAAS tests taken in grades 7, 8 and 10 is 15 to 25 percentage points lower than the region and the state.

Exhibit 2-16
Percentage of Students Passing TAAS
In FWISD, Region 11 and State
1995-1996 and 1999-2000

Grade Level*	Reading		Mathematics		Writing		Science		Social Studies		All Tests Taken	
	1996	2000	1996	2000	1996	2000	1996	2000	1996	2000	1996	2000
Grade 3												
FWISD	68.8%	83.2%	63.1%	76.3%							55.8%	71.4%
Region 11	83.1%	89.6%	78.4%	83.5%							72.8%	80.2%
State	80.5%	87.9%	76.7%	80.6%							70.4%	77.1%
Grade 4												
FWISD	66.7%	85.4%	62.4%	80.4%	75.3%	86.8%					50.7%	73.8%
Region 11	80.4%	91.2%	79.5%	88.7%	86.3%	91.9%					68.9%	83.0%
State	78.3%	89.9%	78.5%	87.1%	86.3%	90.3%					67.2%	80.3%
Grade 5												
FWISD	72.1%	83.3%	64.6%	88.0%							58.6%	79.7%
Region 11	85.3%	89.5%	80.9%	92.8%							76.1%	87.0%
State	83.0%	87.8%	79.0%	92.1%							73.5%	85.0%
Grade 6												
FWISD	63.9%	75.6%	61.6%	78.7%							52.0%	69.2%
Region 11	83.0%	88.8%	80.4%	90.8%							74.6%	85.2%
State	78.4%	86.0%	77.8%	88.5%							70.1%	81.5%
Grade 7												
FWISD	70.8%	70.9%	55.5%	78.0%							51.5%	64.8%
Region 11	85.6%	86.0%	75.8%	89.4%							72.9%	82.2%
State	82.6%	83.5%	71.5%	88.1%							68.0%	79.3%

Grade 8												
FWISD	64.0%	80.0%	52.2%	81.8%	67.1%	73.2%	63.7%	75.9%	54.1%	52.0%	38.0%	45.1%
Region 11	81.5%	91.0%	73.4%	91.4%	79.8%	85.9%	82.0%	90.2%	75.5%	76.1%	59.2%	68.9%
State	78.3%	89.6%	69.0%	90.2%	76.9%	84.3%	78.0%	88.2%	70.2%	71.8%	53.7%	64.6%
Grade 10												
FWISD	71.9%	81.6%	54.9%	75.0%	77.1%	82.5%					48.4%	66.8%
Region 11	86.2%	92.4%	70.9%	88.4%	88.4%	91.8%					65.9%	83.1%
State	81.9%	90.3%	66.5%	86.8%	86.0%	90.7%					60.7%	80.4%

*Source: 1995-96 and 1999-2000 TEA AEIS Reports.
 * Blank areas indicate that the TAAS is not administered in those grade levels for those particular tests.*

The percentage of students passing the TAAS reading test ranges from approximately 70 percent in grade 7 to approximately 80 percent in grades 8 and 10. For the state, the percentage of students passing the reading test ranges from 83.5 percent in grade 7 to 90.3 percent in grade 10. This same pattern is evident in the TAAS mathematics test.

Exhibit 2-17 shows there is also a discrepancy between the performance of ethnic minority students in FWISD and the state. This difference in performance is not observed between Anglo students in FWISD and Anglo students statewide. The disparity between Anglo students in FWISD and Anglo students statewide ranged from 0.3 to 1.1 percentage points in 1999-2000, while the disparity between ethnic minorities in FWISD and the state ranged from 3.8 to 6.7 percentage points.

**Exhibit 2-17
 Percent of Students Passing TAAS Reading, Math and Writing
 Grades 3 - 8, 10
 1999-2000**

Student Group	State Spring 2000 Grades 3-8, 10 Percent Passing	FWISD Spring 2000 Grades 3-8, 10 Percent Passing	Disparity Between FWISD and State
Reading			

All Students	87.4%	80.2%	-7.2
African American	80.8%	74.1%	-6.7
Hispanic	80.7%	76.9%	-3.8
Anglo	94.3%	93.4%	-0.9
Economically Disadvantaged	79.8%	74.9%	-4.9
Math			
All Students	87.4%	80.0%	-7.4
African American	77.0%	70.6%	-6.4
Hispanic	82.9%	79.2%	-3.7
Anglo	93.6%	92.5%	-1.1
Economically Disadvantaged	81.1%	75.6%	-5.5
Writing			
All Students	88.2%	81.3%	-6.9
African American	82.4%	76.1%	-6.3
Hispanic	82.3%	77.6%	-4.7
Anglo	94.0%	93.7%	-0.3
Economically Disadvantaged	81.3%	75.6%	-5.7

Source: FWISD District Educational Improvement Plan 2000-2001.

In the district's DEIP for 2000-2001, it states that while the "district as a whole has made progress and the achievement gap between minority and Anglo students has decreased substantially, achievement remains below expectations among minority and economically disadvantaged populations." The DEIP states that the district will provide "tutoring for students in six middle schools designated low-performing or at risk of low-performing status."

FWISD middle school students do not perform as well on the TAAS reading tests as the district's elementary school students. Although this trend is also evident in statewide data, **Exhibit 2-18** shows that for TAAS reading there was an eight-point difference between the percentage of elementary versus middle school students passing in 1999-2000, compared to a 2.2 percentage point difference between elementary and middle grade TAAS reading performance at the state level.

Exhibit 2-18
Percent of Students Passing TAAS Reading
Performance Gap Elementary and Middle Schools
1999-2000

District	Reading			Mathematics		
	Elementary	Middle School	Gap	Elementary	Middle School	Gap
Austin	85.2%	78.1%	(7.1)%	81.3%	78.9%	(2.4)%
Dallas	70.3%	73.4%	3.1%	66.4%	76.8%	10.4%
Fort Worth	83.9%	75.5%	(8.4)%	81.5%	81.9%	0.4%
Houston	85.8%	77.2%	(8.6)%	81.1%	79.6%	(1.5)%
El Paso	86.2%	79.1%	(7.1)%	85.1%	81.1%	(4.0)%
State	88.5%	86.3%	(2.2)%	86.6%	88.9%	2.3%

Source: 1999-2000 TEA AEIS Reports.
Performance gap was obtained by calculating an average of TAAS scores for grades 3, 4 and 5 for elementary schools and an average for grades 6, 7 and 8.

The DEIP specifies objectives for grades 2 and 3 reading, writing and the English II end-of-course examination, but it does not specifically address the discrepancy between elementary and middle school reading TAAS scores.

As shown in **Exhibit 2-19**, significant discrepancies were also found between the percentage of FWISD students passing the science and social studies TAAS, and the percentage passing in Region 11 and state. FWISD students' passing percentages were approximately 20 points lower for these two tests when compared to the state and Region 11 averages.

Exhibit 2-19
Percent of Students Passing Science and Social Studies TAAS
Grades 8 and 10
1999-2000

District	Science		Social Studies	
	1996	2000	1996	2000

FWISD	63.7%	75.9%	54.1%	52.0%
Region 11	82.0%	90.2%	75.5%	76.1%
State	78.0%	88.2%	70.2%	71.8%

Source: TEA AEIS reports (1995-96 through 1999-2000).

Chapter 2

EDUCATIONAL SERVICE DELIVERY

A. Student Performance (Part 2)

A new TAAS imperative in the district's improvement plan for 2000-2001 states that the "District's passing rate for social studies and science will meet or exceed state performance levels in all grades tested and among all student groups as measured by state assessment tests." The DEIP clearly identifies required objectives and strategies and assigns a responsible staff person, implementation timelines, desired outcomes and evaluation criteria.

FWISD's TAAS scores indicate that student performance decreases during the transition from elementary to middle and secondary grades. Several state and national initiatives can provide direction for addressing FWISD's student transition issues. For example, at the 1999 National Forum to Accelerate Middle-Grades Reform, information was presented on identifying high-performing middle schools. After a year of collaboration, the forum identified criteria to describe high-performing schools that serve students in the middle grades. Such schools are academically excellent, responsive to the developmental challenges of young adolescents, and socially equitable with high expectations for all students. The Forum conducted a national search for "schools to watch" that meet its criteria. So far, they have identified four schools: Barren County Middle School in rural Kentucky, Jefferson Middle School in Champaign, Illinois, Thurgood Marshall Middle School in Chicago, Illinois and Freeport Intermediate School in Freeport, Texas. This information is available at the website for the National Center to Accelerate Middle Grade Reform (www.mgforum.org).

The Texas Mentor School Network (TMSN), coordinated through the Austin regional education service center (Region 13), began in 1991 with a statewide group of middle schools. These schools implemented research-based practices identified in *Turning Points: Preparing American Youth for the 21st Century*, the Carnegie Foundation report published in June 1989. TMSN connects school staff and policy makers to important middle school research and promising practices. The network shares findings to improve middle schools. Through the middle school mentor network, all middle schools in the state have access to the knowledge about other schools with similar demographics and high student performance. The Texas Mentor Network has a school network for elementary, middle and high schools. Morningside Middle School and Benbrook Elementary in FWISD are currently members of the network.

Recommendation 13:

Establish a districtwide elementary and middle school initiative that identifies and addresses critical issues regarding effective transitions.

A selected group of elementary and middle school teachers and administrators should periodically discuss and develop an effective student transition plan. Elementary, middle and secondary school curriculum directors should be involved in the development of this plan.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The associate superintendent of Curriculum designates at least three central office curriculum staff, one for elementary, one for middle school and one for high school, as curriculum/transition team specialists to each of the academic content areas of reading, mathematics, writing, science and social studies.	June 2001
2.	The associate superintendent of Curriculum directs the transition team to coordinate elementary and middle school staff, and middle and high school staff, to identify areas of cross-grade-level cooperation and alignment and to make recommendations for improvement.	July 2001
3.	The transition team researches effective transition-related practices such as those found in the Educational Development Center (www.edc.org), National Center to Accelerate Middle Grade Reform (www.mgforum.org) and the Texas Mentor Network to identify high-performing middle schools.	August 2001
4.	The associate superintendent of Curriculum directs campus principals and curriculum specialists to implement the recommendations of the transition teams.	August 2001
5.	The staff of Research and Evaluation evaluate the effectiveness of additional support and the impact of transition teams on improving student performance.	May 2002

FISCAL IMPACT

This recommendation could be accomplished with existing resources.

FINDING

In FWISD, compared to Anglo students, a smaller percentage of ethnic minority students take the Scholastic Aptitude Test (SAT) and ACT Assessment, which are both college entrance examinations. In addition, a smaller percentage of ethnic minority students, compared to Anglo students, score at or above the minimum criteria on college entrance examinations, compared to peer districts, Region 11 and the state. Among the districts examined, FWISD also reports the lowest percentage of African American and Hispanic students completing advanced academic courses.

The ACT Assessment and SAT I: Reasoning Tests are college entrance examinations. The ACT includes English, mathematics, reading and science reasoning components, with scores ranging from 1 to 36 on each component. The ACT composite is the average of the four component scores. The SAT includes a verbal and mathematics component. SAT scores range from 200 to 800 for each test component. The combined SAT total score, which is the most frequently reported score, ranges up to a maximum of 1600.

Exhibit 2-20 presents 1999 SAT and ACT information for FWISD, its peer districts, Region 11 and the state. Compared to the peer districts, FWISD students have the second lowest average scores on the SAT and the ACT. FWISD's percentage of students taking either the ACT or SAT is comparable to its peers, but lower than the state and Region 11 average.

Exhibit 2-20 College Entrance Examination Scores

**FWISD and Peer Districts
Class of 1999**

District	Percent of Students Scoring Above Criterion	Percent of Students Taking Examinations	Average SAT Score	Average ACT Score
Austin	41.0%	58.4%	1052	20.8
Dallas	12.8%	52.6%	871	17.9
Fort Worth	23.0%	52.1%	941	19.1
Houston	22.8%	59.5%	935	19.2
El Paso	19.1%	56.2%	942	20.0
Region 11	30.8%	64.6%	1019	21.0
State Average	27.2%	61.7%	992	20.3

Source: 1999-2000 TEA AEIS Reports.

Exhibit 2-21 shows that while 52.1 percent of FWISD students take either the ACT or SAT, there is considerable variance among the district's high schools. This exhibit contains the scores for Anglo, African American and Hispanic FWISD students, and includes the percentage of students taking either the ACT or SAT. The percentage of students taking either the SAT or ACT ranges from 20.8 percent in Diamond Hill High School to 75 percent at Arlington Heights High School. The percentage of Hispanic students taking these tests is as low as 18.5 percent in Diamond Hill High School. **Exhibit 2-21** also shows that schools with a higher percentage of students taking college entrance examinations have the lowest percentage of economically disadvantaged students. At Diamond Hill High School, for example, where almost 60 percent of the students are economically disadvantaged, only 20.8 percent of the students in the class of 1999 took the SAT or ACT, compared to 68.2 percent at Southwest High School, a school with 11.5 percent of the students identified as economically disadvantaged. This discrepancy may, in part, be related to the number of students completing advanced academic courses.

Exhibit 2-21 shows that SAT and ACT scores vary across campuses and student population groups. Differences across campuses range from 774 (average SAT I score) in Polytechnic High School to 1019 at Paschal High School. These scores differ by 245 points. In addition, there is a 296-point difference between African American SAT scores at the highest (North Side High School) and lowest (Polytechnic High School) performing high schools.

**Exhibit 2-21
College Entrance Examination Scores (SAT and ACT)
FWISD High Schools, Class of 1999**

				Anglo	African	Hispanic	All Students
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High School	Percent Minority	Percent Econ. Disadv.	Percent Take Advanced Courses	Percent Take SAT ACT	Average SAT I Total Score	American		Percent Take SAT ACT	Average SAT I Total Score	Percent Take SAT ACT	Average SAT I Total Score
						Percent Take SAT ACT	Average SAT Total Score				
Arlington Heights	45.8%	20.6%	11.6%	79.7%	1019	66.7%	795	47.7%	879	75.0%	975
Carter-Riverside	76.1%	54.9%	12.1%	57.9%	975	42.9%	--	21.1%	61	39.3%	861
Diamond Hill	95.7%	59.5%	11.4%	--	--	50.0%	818	18.5%	809	20.8%	808
Dunbar	90.7%	29.0%	20.9%	88.9%	1253	54.8%	855	55.6%	1078	64.8%	1004
Eastern Hills	79.9%	26.2%	9.7%	63.6%	984	47.7%	819	47.8%	887	54.1%	890
North Side	94.7%	47.4%	20.6%	70.4%	1124	87.5%	1017	38.0%	870	47.8%	940
O. D. Wyatt	94.9%	33.4%	10.5%	42.9%	--	52.2%	796	25.0%	--	50.9%	800
Paschal	64.4%	27.2%	22.0%	80.3%	1129	66.7%	897	31.8%	846	55.7%	1019
Polytechnic	96.5%	55.0%	10.4%	100%	--	62.3%	721	48.7%	796	60.8%	774
Southwest	45.4%	11.5%	19.1%	78.4%	1040	48.5%	818	50.0%	996	68.2%	990
Trimble	95.1%	42.8%	13.5%	11.1%	--	39.5%	735	30.6%	830	28.0%	766
Western Hills	36.0%	14.8%	14.4%	70.6%	1024	61.7%	819	50.0%	913	68.0%	984
FWISD	77.2%	58.0%	13.9%	72.6%	1,048	50.0%	813	29.2%	868	52.1%	941
State Average	56.9%	49.0%	17.5%	68.9%	1,043	58.6%	846	49.5%	899	61.8%	989

Source: 1999-2000 TEA AEIS Reports.

SAT and ACT scores are closely related to participation in advanced academic courses. According to the College Board, the national organization responsible for administering the SAT, there is a strong relationship between the number of advanced academic courses a student takes and their performance on a college entrance examination. On its Web site (www.collegeboard.org), the College Board states that "The best ways to get ready for the SAT I are to take challenging academic courses and to read widely outside school throughout your school years. Taking the PSAT is another excellent way to get ready."

Exhibit 2-22 shows there is a significant discrepancy among FWISD's high schools in the percentage of students taking advanced academic courses.

Exhibit 2-22 shows the percentage of students completing advanced academic courses. Compared to the peer districts, FWISD ranks fourth lowest in the percentage of all students completing advanced

academic courses. FWISD has the lowest percentage of African American (9.1 percent) and Hispanic students (9.7 percent) completing advanced academic courses when compared to the peer districts, Region 11 and the state. It also has the lowest percentage (8.3 percent) of economically disadvantaged students completing advanced academic courses.

Exhibit 2-22
Percent of Students Completing Advanced Academic Courses
FWISD and Peer Districts
1998-99

District	Percent of Students Completing Advanced Academic Courses				
	All Students	African American	Hispanic	Anglo	Economically Disadvantaged
Austin	19.8%	11.9%	12.8%	28.2%	10.1%
Dallas	18.7%	18.5%	15.2%	31.0%	16.5%
Fort Worth	13.9%	9.1%	9.7%	23.4%	8.3%
Houston	15.9%	14.2%	11.9%	29.6%	11.2%
El Paso	13.1%	11.2%	10.5%	22.2%	8.5%
Region 11	17.2%	9.6%	10.0%	19.4%	8.7%
State Average	17.5%	11.7%	12.9%	21.3%	11.3%

Source: 1999-2000 TEA AEIS Reports.

The district's 1999-2000 DEIP identifies imperatives related to both SAT scores and advanced placement (AP) exams (Imperatives 1-3 and Imperative 8), but it does not address the need to increase the number of students completing advanced academic courses. The district did not meet the objectives set out in its 1999-2000 DEIP.

The 2000-2001 DEIP identifies the need to increase ethnic minority student representation in honors and advanced placement classes. The plan states that "the number of under-represented students enrolled in honors, Pre-AP, and AP courses ... will increase annually." In addition, the DEIP states, "the percentage of students being tested as well as the average district score on the verbal and mathematical components of the ACT and SAT will meet or exceed state and national levels." In most cases, the persons responsible for ensuring this objective is met are academic coordinators, counselors and principals.

In September 2000, the Charles A. Dana Center, an educational research organization at the University of Texas at Austin, published a report, *Equity-Driven Achievement-Focused School Districts*. The Dana Center selected four school districts that represented the "best of the best" in terms of academic performance for ethnic minority and economically disadvantaged students. These school districts-San Benito CISD, Brazosport ISD, Wichita Falls ISD and Aldine ISD-showed significant gains in the percentage of ethnic minority students taking the SAT, the percentage scoring at or above the passing

criteria on these examinations and the percentage of students enrolled in advanced academic courses. The study identifies several examples of why and how these school districts are successful, ranging from the impact of the state accountability system to local community involvement. Specific findings included:

- The study districts developed the key understanding that to be successful they had to change teaching and learning practices in the classroom.
- The districts developed a set of shared equity beliefs regarding their commitment to the academic success of all children.
- Specific processes, practices, programs, actions and structures - focused equity practices - were instituted to achieve success for all students.
- One key strategy used was proactive redundancy, or having multiple ways to achieve specific learning goals.

In addition to the schools identified by the Dana Center, other schools in Texas have implemented strategies to increase the number of students taking the SAT. Ysleta ISD (YISD) initiated a PSAT/SAT program initiative to encourage all secondary students to take college entrance examinations before high school graduation. YISD pays for student test fees for both the PSAT and the SAT. Each SAT costs \$24 to administer. Included in the district initiative are programs for test taking, mini-camps for students and sessions involving parents and teachers in the process of preparing students for college admissions. The percentage of YISD seniors taking the SAT has risen from 27 percent in 1978 to more than 53 percent in 1997. YISD is piloting an SAT preparation class for the spring 2000 semester at all ten district high schools in cooperation with the Houghton-Mifflin Publishing Company. The district also has purchased College Board preparation materials for student use.

Recommendation 14:

Encourage ethnic minority and economically disadvantaged students to take and pass advanced academic courses and college entrance examinations.

To increase the number of "all students" taking the SAT or ACT and completing advanced academic courses, FWISD should include in the DEIP strategies that ensure educational opportunities are available for all student groups.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent closely monitors the implementation of the objectives and strategies already identified in the DEIP imperative number 8 for Advanced Academic and Special Interest Programs. This imperative should also state that the district will increase the number of students who take and pass advanced academic courses and college entrance examinations.	July 2001 - Ongoing
2.	The superintendent includes strategies in the DEIP to achieve educational equity among all student groups. Imperatives, such as 8-3 and 8-4, should be for <i>all</i> students, not just those enrolled in advanced academics or special interest programs.	September 2001 - Ongoing
3.	The director of Research and Evaluation and high school counselors identify course	September

	selection patterns for all student groups.	2001
4.	The director of Research and Evaluation and high school counselors survey seniors in high schools on their preparation for ACT and SAT.	September 2001
5.	The director of Research and Evaluation analyzes and reports the relationship between students taking advanced academic courses and participation/passing the SAT/ACT college entrance examinations.	September 2001
6.	School principals meet with ISTs to develop strategies to increase the percentage of students taking advanced academic courses and college entrance examinations.	January 2002
7.	School principals meet with ISTs to analyze the results of the program.	Ongoing

FISCAL IMPACT

This recommendation could be accomplished with existing resources.

FINDING

FWISD's participation profile indicates that the percent of students taking the TAAS in the district in 2000 was lower than all of the peer districts, Region 11 and the state. The number of students participating in the TAAS as well as the numbers and reasons for non-participation are reported in AEIS as the district's "participation profile" for students in grades 3-8 and 10.

For FWISD students not tested, the percentage of those receiving a LEP exemption was the second highest among the five districts, and more than twice as high as Region 11 and the state (**Exhibit 2-23**).

Exhibit 2-23
2000 TAAS Participation Rates
FWISD, Peer Districts, ESC 11, and State

	Percent Participation						
	Fort Worth	Austin	Dallas	El Paso	Houston	Region 11	State
Tested	85.8	88.5	87.1	91.5	89.6	90.1	90.2
Absent	1.2	1.7	1.0	1.0	0.7	0.7	0.6
ARD Exempt	8.7	6.6	6.9	4.2	6.8	7.0	7.1
LEP Exempt	3.0	2.0	3.9	2.4	1.8	1.4	1.3
Other	1.4	1.3	1.2	0.8	1.0	0.7	0.8
Total	100.1	100.1	100.1	99.9	99.9	100.0	100.0

Source: Texas Education Agency.

FWISD students not tested due to receiving an ARD exemption was the highest among the five districts, Region 11 and the state.

The percent of FWISD students taking the TAAS slightly increased between 1999 and 2000, from 84.4 percent to 85.8. The factors contributing most significantly to the increased percent of students tested was the decrease in the number of students who received ARD and LEP exemptions (**Exhibit 2-24**).

Exhibit 2-24
FWISD TAAS Participation Rate
1999 and 2000

	Participation Rate		
	1999	2000	Percentage Point Difference
Tested	84.4	85.8	+1.4
Absent	1.2	1.2	0
ARD Exempt	9.2	8.7	-0.5
LED Exempt	3.6	3.0	-0.6
Other	1.2	1.4	+0.2
Total	99.6	100.1	

Source: 1999-2000 AEIS District Report: Texas Education Agency.

Recommendation 15:

Implement plans to reduce TAAS exemption rates for all students.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent forms a committee that includes the associate superintendents, executive directors and directors of the Special Education, Bilingual/ESL and Research and Evaluation departments, as well as campus principals.	August 2001
2.	The committee meets to identify the reasons for the district's high TAAS exemption rates; particularly for special education and bilingual students, and to develop an action plan to reduce the rates.	September through November 2001
3.	The committee submits a draft of the action plan to the superintendent for review and approval.	December 2001
4.	The superintendent approves the plan and instructs the associate superintendents to implement the plan.	January 2002

5.	The director of Research and Evaluation monitors the results of the plan and includes an analysis of the results in the annual TAAS Subject Report.	Annually
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FISCAL IMPACT

This recommendation could be accomplished with existing resources.

FINDING

Exhibit 2-25 shows that FWISD's student passing rates for Algebra I, Biology I and English II end-of-course (EOC) examinations are lower than the peer districts and the state average. While this is true of all student population groups, significant gaps exist between Hispanic and African American students in FWISD when compared to the peer districts. These low EOC scores may also be related to the low percentage of students taking advanced academic courses in FWISD.

FWISD's 1999-2000 DEIP recognized the need to increase the percentage of students who pass EOC examinations. Between 1999 and 2000, for most exams and most student groups, the percentage of students passing any of the EOC examinations decreased. The percentage of African American students passing the Algebra I EOC examination remained the same from 1999 to 2000; however, the percentage of Hispanic and economically disadvantaged students passing this test decreased significantly. For Hispanic students, the percentage passing dropped from 25.5 percent in 1999 to 16.6 percent in 2000. For economically disadvantaged students, the percentage dropped from 25.4 percent in 1999 to 17.3 percent in 2000. The 2000-01 DEIP states, "Sufficient emphasis is not always given to the EOC examinations, resulting in low scores."

To increase the percentage of students passing EOC examinations, DEIP strategies related to mathematics and English language arts include an identified objective to increase the percentage of students passing the English II and Algebra I EOC examinations. The DEIP does not include a specific strategy or imperative that addresses the need to increase the percentage of students passing the History and Biology EOC examinations.

**Exhibit 2-25
FWISD and Peer Districts
Percent Passing End-of-Course Exams by Student Group
1999-2000**

District	Percent of Students Passing Algebra I				
	All Students	African American	Hispanic	Anglo	Economically Disadvantaged
Austin	36.9%	14.9%	21.7%	60.5%	17.9%
Dallas	24.8%	19.5%	24.0%	50.2%	22.9%
Fort Worth	23.4%	13.3%	16.6%	46.9%	17.3%

Houston	37.1%	27.4%	33.8%	71.4%	33.3%
El Paso	35.1%	23.1%	30.3%	58.2%	27.1%
Region 11	48.5%	21.8%	27.0%	58.2%	29.2%
State Average	43.9%	26.5%	32.7%	56.7%	31.3%
	Percent of Students Passing Biology I				
Austin	73.1%	55.5%	60.3%	90.6%	55.1%
Dallas	70.8%	70.4%	67.2%	88.6%	66.6%
Fort Worth	62.5%	51.8%	55.2%	88.3%	50.7%
Houston	70.5%	68.1%	65.3%	93.5%	62.6%
El Paso	76.6%	79.7%	72.1%	92.0%	67.4%
Region 11	83.1%	63.4%	65.6%	91.0%	65.9%
State Average	80.3%	69.0%	69.4%	91.2%	68.2%
	Percent of Students Passing English II				
Austin	72.3%	53.0%	63.3%	85.1%	56.4%
Dallas	69.8%	67.9%	68.7%	85.5%	65.7%
Fort Worth	59.4%	46.6%	55.6%	78.4%	52.8%
Houston	72.7%	71.5%	67.8%	88.7%	67.6%
El Paso	76.5%	77.6%	72.8%	90.0%	68.1%
Region 11	79.1%	61.5%	67.3%	84.6%	65.7%
State Average	77.7%	68.4%	71.1%	84.4%	68.6%
	Percent of Students Passing US History				
Austin	74.6%	62.1%	64.4%	86.5%	56.9%
Dallas	56.7%	57.4%	53.2%	78.9%	53.6%
Fort Worth	58.4%	46.2%	51.8%	82.7%	46.1%
Houston	52.2%	47.1%	43.5%	88.3%	38.8%
El Paso	73.7%	82.3%	68.2%	91.4%	62.2%
Region 11	78.8%	61.2%	60.8%	85.7%	59.0%
State Average	72.1%	58.1%	58.3%	84.0%	54.9%

Source: 1999-2000 TEA AEIS Reports.

A publication by The Charles A. Dana Center at the University of Texas at Austin, *Improving End-of-Course Exams: Evidence from the Field*, published in the fall of 2000, identifies several successful ways to help schools increase the percentage of students taking and passing end-of-course examinations. While this report identifies strategies that are specific to the Algebra I EOC examination, recommendations by the Dana Center can be used for other EOC examinations. The report states, "The action by administrators and teachers in schools with improving scores on the Algebra I end-of-course examination were markedly different from those taken by administrators and teachers in schools with declining scores." According to this study, schools with improved scores implemented benchmarks or standards for student performance; assigned experienced teachers to the Algebra I classes; provided them materials, resources and common planning time; and provided access to structured, well-designed professional development. Schools with declining scores "did not report support from the administrators or other instructional leaders and many teachers reported feeling isolated and that they had little experience in teaching Algebra..."

Recommendation 16:

Develop strategies that prepare students to pass the end-of-course examinations.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent directs school principals and the curriculum director to identify successful strategies from the Dana Center study to implement in FWISD schools.	June 2001
2.	The superintendent develops specific strategies that are applicable from the Dana Center study to increase passing rates for end-of-course examinations and make this part of the DEIP.	July - August 2001
3.	Each high school principal, with assistance from the instructional support teams, develops strategies to increase end-of-course examination passing rates and includes these strategies in the annual Campus Education Improvement Plan (CEIP).	July - August 2001
4.	The associate superintendent of Curriculum assesses the teacher qualifications and credentials of all teachers in classes with EOC examinations and ensures that qualified teachers are teaching all courses with EOC examinations.	September 2001 - Ongoing
5.	The director of Research and Evaluation and the associate superintendent of Curriculum jointly conduct an evaluation study of student performance in all courses with end-of-course examinations-Algebra I, English II, History and Biology I.	September - December 2001
6.	School principals, ISTs and the associate superintendent of Curriculum use the results of evaluation studies to improve end-of-course-examination scores.	December 2001

FISCAL IMPACT

This recommendation could be accomplished with existing resources.

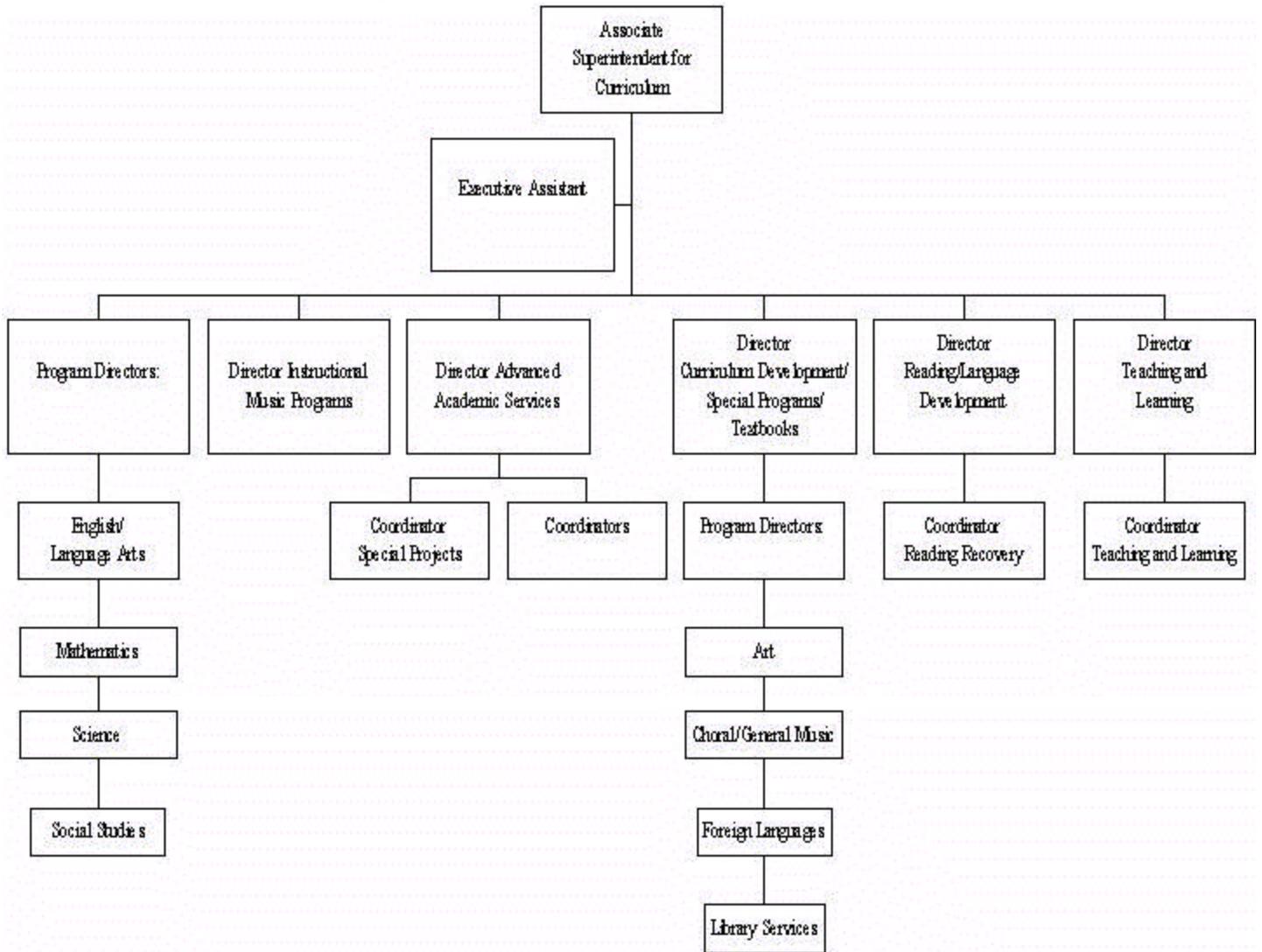
Chapter 2

EDUCATIONAL SERVICE DELIVERY

B. Instructional Resources

Instructional resources include the fiscal and human resources available to ensure successful student learning. The district's organization chart for Curriculum and Instruction is displayed in **Exhibit 2-26**.

Exhibit 2-26
Department of Curriculum Organization



Source: FWISD 2000-2001 Organizational Chart.

FINDING

The district has developed a set of curriculum guides, called *Pathways to Excellence*, which align the district's instructional efforts to the state-mandated curriculum, the Texas Essential Knowledge and Skills (TEKS). Sections on Special Education and English as a Second Language (ESL) modifications as well as Gifted/Talented enhancement and differentiation strategies are included at the end of the curriculum guides. FWISD has also developed guides for the curriculum content areas identified in the state's foundation curriculum (English Language Arts, Mathematics, Science and Social Studies) as well as for foreign languages. The district's curriculum guides will address the academic content areas in the state's enrichment curriculum and other areas at a later time.

The dual purpose of *Pathways to Excellence* is "to assist teachers and building administrators by charting critical *Pathways to Excellence* through the state-mandated curriculum as outlined in the TEKS, as well as through the textual materials adopted for the various subjects and courses, and to provide faculty development activities necessary for successful implementation."

According to the general overview in the 1999-2000 curriculum guides, the standard curriculum will include the following components:

- Clear, districtwide academic content standards based on the TEKS for what is to be taught and learned in each grade level or course;
- A recommended teaching sequence for each grade level or course correlated to the adopted textbook or other instructional materials;
- A carefully designed vertical spiral continuum of skills, showing how the content standards are developed, expanded and enriched from kindergarten to high school;
- Correlations to the TEKS, the TAAS, End-of-Course and Advanced Placement (AP) examinations and the adopted texts;
- Suggested instructional activities and strategies to assist teachers in their daily lesson planning;
- Assessment tools to guide teachers in determining levels of student mastery;
- Other components (philosophy, resource/reference materials, etc.) as appropriate for the various academic content areas; and
- Faculty development to support implementation of the curriculum.

The associate superintendent for Curriculum provides leadership, direction and oversight for the project, but the district's curriculum guides were developed through the collaboration of all departments to make it clear that the district's standards apply to all students. Other staff with specific leadership responsibilities include the director of Reading and the program directors for English Language Arts, Mathematics, Science, and Social Studies as well as staff from Bilingual/English as a Second Language (ESL), Advanced Academic Services, Special Education and other departments. Teacher committees and sub-committees representative of the entire district participated in developing the *Pathways to Excellence* curriculum guides.

COMMENDATION

FWISD's *Pathways to Excellence* curriculum guides and training ensure curriculum standardization, equity and access across the district.

FINDING

The reconstitution of low-performing FWISD elementary schools improved their accountability ratings. FWISD reconstituted four of its lowest-performing elementary schools in 1995 and reconstituted four others in subsequent years through its Elementary School Initiative (ESI).

Students in reconstituted schools receive 200 days of instruction. Staff members employ a comprehensive approach including research-based instruction, health and social services, parental involvement, staff development and defined approaches to student conduct. Through additional days of instruction, students are given formative and summative assessments, and instruction focused on helping them improve in their weak areas.

In the first four and two of the last four reconstituted schools, the principal and all staff members had to reapply for their positions. **Exhibit 2-27** shows that reconstituted schools had an *Acceptable* rating or higher for the 1999-2000 school year. Of the four schools in the first cohort, one was *Exemplary*, two were recognized and one was acceptable. In the second group of four schools, two were *Recognized* and two were *Acceptable*.

Exhibit 2-27
Accountability Ratings for Reconstituted Elementary Schools
1999-2000

School	Cohort	1999-2000 Rating
De Zavala Elementary	1	Acceptable
Kirkpatrick Elementary	1	Recognized
Logan Elementary	1	Exemplary
Van Zandt-Guinn Elementary	1	Recognized
Versia Williams Elementary	2	Recognized
D. McRae Elementary	2	Acceptable
E.J. Briscoe Elementary	2	Recognized
I.M. Terrell Elementary	2	Acceptable

Source: 2000 District Accountability Summary.

COMMENDATION

The reconstitution of low-performing elementary schools was a bold step that increased student achievement through a comprehensive approach to school reform.

FINDING

FWISD has implemented a well-researched reading initiative to ensure all students can read by the end of grade 2, and that they will continue to read at grade level until high school graduation. Based on

recommendations from an external review team of reading instruction experts, the Board of Trustees approved \$1 million of district funds to support reading instruction. The board also hired a director of Reading to oversee program improvements. The district's reading initiative was implemented in 32 elementary schools in the 1998-99 school year.

Initially, schools were selected for the reading initiative because their student population was more than 48 percent economically disadvantaged. More than 13 percent of the students were limited English proficient (LEP), and in some cases, less than half of the students passed the reading section of the TAAS. In addition to FWISD funding, the reading initiative received a \$750,000 Academics 2000 grant for 30 elementary schools, \$1 million for Reading Academies in seven schools, a \$1.8 million grant to fund Corrective Reading programs in 10 schools and a second \$750,000 Academics 2000 grant for 27 more schools. These funds were supplemented by substantial, but smaller, grants from the community.

FWISD's approach to improving student reading was based on "direct instruction" models, which accelerate student learning by maximizing efficiency in the design and delivery of instruction (see the Association for Direct Instruction Web site, www.adihome.org). Three direct instruction models were selected for implementation in the FWISD reading initiative: Open Court, Reading Mastery and Corrective Reading. These three models provide consistent daily practice of reading skills, continuous assessment of student progress and immediate correction of student errors. Struggling readers at higher grade levels receive the Corrective Reading program.

Consultants/coaches provide ongoing training for teachers, principals, staff and substitute teachers. Retraining is provided as needed. Teachers are coached, which involves external consultants as coaches, regularly scheduled classroom visits, modeling instructional strategies to teachers, immediate feedback to teachers and school-based small group training. Successful teachers are identified and trained to become mentors. Mentors' duties include observing, coaching, training and facilitating data collection. The implementation schedule of the Reading Initiative is as follows:

1998-1999

- 32 elementary schools, 1 middle school
- Over 600 teachers, 8,000 students

1999-2000

- 62 elementary schools, 13 middle schools, 8 high schools
- Over 2,000 teachers, and over 20,000 students

2000-2001

- 65 elementary schools, 22 middle schools, 13 high schools
- Over 3,000 teachers, and over 45,000 students

FWISD Research and Evaluation staff members are collaborating with an external evaluation team of university researchers and reading experts to evaluate the district's reading program. The evaluation focuses on implementation of the reading program and feedback, as well as indicators of program

effectiveness. Reading achievement outcome measures include the Texas Primary Reading Inventory (TPRI) given to kindergarten and grade 1-2 students three times yearly and the Stanford 9 norm-referenced achievement test administered to grade K-2 students in the fall and spring of the first two years and yearly thereafter.

FWISD Research and Evaluation reports indicate that the percentage of students meeting the Texas Primary Reading Inventory (TPRI) passing criteria increased from year 1 to year 2 for all grade levels tested, there has been a decrease in the achievement gap between traditional program and direct instruction model schools, and the achievement gap for ethnic minority and economically disadvantaged students has decreased.

Exhibit 2-28 shows that students in direct instruction model schools are performing near the level of regular education students in non-reading program schools. Schools with direct instruction models are gaining at a similar or greater rate than regular education students in traditional reading program schools, as well as performing at or above national norms.

Exhibit 2-28
Outcome Measures for FWISD Reading Initiative
by Instructional Program for 1999-2000

	Non-Program Schools	Open Court 2000	Open Court	Reading Mastery
Percent Meeting Texas Primary Reading Inventory Criteria in May 2000				
Kindergarten	89.0%	89.0%	91.0%	88.0%
Grade 1	89.0%	89.0%	91.0%	88.0%
Grade 2	89.0%	84.0%	81.0%	76.0%
Stanford 9 Total Reading Gains in Year 2 (1999-2000)				
Kindergarten	69	74	67	77
Grade 1	52	63	65	57
Grade 2	26	31	30	34

Source: FWISD Research and Evaluation, FWISD Reading Department, August 2000.

During TSPR interviews and focus groups, administrators and school staff praised the district's reading program and were especially pleased the program encompassed more than TAAS skills. Elementary principals like having options and flexibility. Several principals and teachers said the direct instruction model has made a major difference. Principals reported the ongoing monthly training was of high quality and reading staff from central administration observed and monitored teachers' reading lessons.

COMMENDATION

FWISD's reading initiative provides a direct instruction model for the early grades that improves student reading skills.

FINDING

FWISD's reading initiative results for students in the early elementary grades are promising, but TAAS scores show that student reading performance declines in the upper elementary and middle school grades. **Exhibit 2-29** compares students' reading performance on TAAS before the implementation of the reading initiative, 1997-98, with student performance on TAAS in the first and second implementation years, 1998-99 and 1999-2000, respectively. TAAS passing percentages for students in grades 3, 4 and 5 were notably higher than passing rates for middle school students in grades 6, 7 and 8. Students in grade 7 had the lowest TAAS passing percentages for reading and showed no improvement in performance over time.

**Exhibit 2-29
FWISD Percentage of Students Passing TAAS Reading
by Year and Grade**

	Grade3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8
1997-1998	77.0%	80.0%	80.0%	71.0%	71.0%	74.0%
1998-1999	82.0%	81.0%	78.0%	74.0%	71.0%	78.0%
1999-2000	83.0%	85.0%	83.0%	75.0%	70.0%	79.0%
Percentage Point Change*	6	4	3	4	-1	5

Source: FWISD Research and Evaluation, TAAS Subject Report Spring 2000.

** Change was calculated by subtracting the percent meeting minimum expectations for 1999-2000 minus the percent meeting minimum expectations for 1997-98.*

Exhibit 2-30 shows that the reading achievement gap between Anglo students and other ethnic groups was reduced between 1998 and 2000, but the TAAS passing percentages for Anglo students were markedly higher and more stable across grade levels. In contrast, passing percentages for African American and Hispanic students declined markedly in the middle-school grades.

**Exhibit 2-30
FWISD Percentage of Students Passing TAAS Reading
by Ethnic Group, Year and Grade**

	African American			Hispanic			Anglo		
	1998	2000	*Change	1998	2000	*Change	1998	2000	*Change
Grade 3	70.0%	74.0%	4	74.0%	82.0%	8	90.0%	93.0%	3

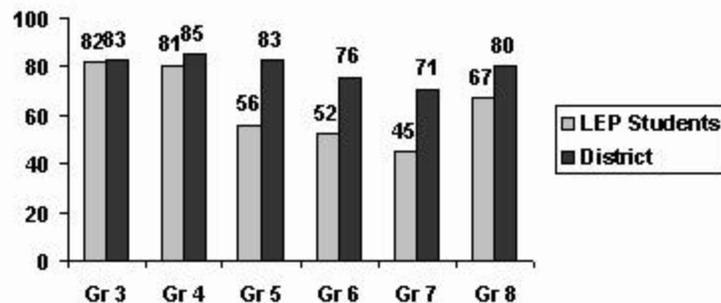
Grade 4	74.0%	78.0%	4	74.0%	84.0%	10	95.0%	95.0%	0
Grade 5	77.0%	77.0%	0	73.0%	80.0%	7	93.0%	94.0%	1
Grade 6	65.0%	69.0%	4	64.0%	70.0%	6	91.0%	92.0%	1
Grade 7	61.0%	63.0%	2	67.0%	64.0%	-3	92.0%	89.0%	-3
Grade 8	64.0%	72.0%	8	71.0%	78.0%	7	92.0%	93.0%	1
Grade 10	70.0%	82.0%	12	68.0%	73.0%	5	94.0%	94.0%	0

Source: FWISD Research and Evaluation, TAAS Subject Report Spring 2000.

* Change was calculated by subtracting the percent meeting minimum expectations for 1999-2000 minus the percent meeting minimum expectations for 1997-98.

Exhibit 2-31 shows that LEP students in grades 3 and 4 had TAAS passing rates comparable to the district average, but the performance of LEP students in the upper grades declined. The district's and LEP students' TAAS reading scores decreased incrementally for grades 5, 6 and 7. LEP students' passing percentages were more than 20 points lower than the district averages. TAAS passing percentages improved for both LEP students and the district in grade 8.

Exhibit 2-31
Percent of Limited English Proficient (LEP) and District Students
Passing TAAS Reading, 1999-2000



Source: Bilingual/ESL Education 1999-2000, FWISD Department of Research & Evaluation, TEA AEIS Reports 1999-2000.

Recommendation 17:

Incorporate instruction that addresses the needs of limited English proficient upper elementary and middle school students in the district's existing reading initiative.

FWISD has taken an important first step by implementing the Corrective Reading program for students reading two or more grades below their expected achievement level. Even so, if FWISD is to meet its

goal of all students reading on grade level until high school graduation, a broader approach is needed. All elementary reading/language arts teachers in grades 3 through 5 and middle school reading/language arts teachers in grades 6 through 8 need training, materials and ongoing support for reading instruction. Moreover, the district's overall progress in reading is directly related to the success of its limited English proficient students. ESL teachers, in particular, need support to meet the needs of limited English proficient students in the upper elementary and middle school grades.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent directs the director of Reading to form a task force composed of upper elementary and middle school teachers, instructional specialists, bilingual/ESL teachers and specialists, program evaluators and principals to make recommendations for an expanded reading (current students plus LEP) initiative.	June 2001
2.	The director of Reading and associate superintendent of Curriculum identify district funding sources and grants that can support the expanded reading initiative.	June 2001
3.	The director of Reading reconvenes the task force to develop an action plan with short-term and long-term goals and objectives for upper elementary and middle school reading.	July - August 2001
4.	The director of Reading implements action plan.	August 2001 - Ongoing

FISCAL IMPACT

This recommendation could be implemented with existing resources.

Chapter 2

EDUCATIONAL SERVICE DELIVERY

C. Dropout Prevention/Counseling/Alternative Schools

Ensuring that all students receive a quality education, graduate from high school and master the knowledge and skills needed to continue to post-secondary education or employment should be the primary goal of all schools. Accurately tracking students who leave school is critical to achieving this goal. For that reason, TEA requires districts to report information on their student dropouts. Districts are required to use the guidelines in the *TEA Leaver Codes and Definitions* to report information on students who withdraw from school.

State Compensatory Education as defined in Texas Education Code (TEC), Section 42.152 (c) requires the district and campus staff to design appropriate strategies for students at risk of academic failure or dropping out of school. These strategies should be based on a needs assessment, and included in the school and/or district improvement plan. By state law, the improvement plan must include a comprehensive needs assessment, measurable performance objectives, identified strategies for student improvement, identified resources and staff, specified timelines for monitoring each strategy and formative evaluation criteria. Each district is responsible for evaluating the effectiveness of its locally-designed program for students at risk of academic failure and dropping out of school.

TEC, Section 29.081 specifies criteria for identifying at-risk students. Students at risk of academic failure and dropping out of school include each student in grades 7 through 12 who is under 21 years of age; has not advanced from one grade level to the next for two or more school years; has mathematics or reading skills that are two or more years below grade level; is not maintaining an average equivalent of 70 on a scale of 100 in two or more courses during a semester or is not maintaining such an average in two or more courses in the current semester, and is not expected to graduate within four years of the date the student begins the ninth grade; is not performing satisfactorily on TAAS; or is pregnant or a parent.

At-risk students in pre-kindergarten through grade 6 include those who are not performing satisfactorily on a first-of-the-year readiness test or assessment instrument or on the state assessment; are students of limited English proficiency; are sexually, physically or psychologically abused; or engage in conduct described by Section 51.03(a), Family Code. In addition, students in any grade are identified as at risk if they are not

disabled and reside in a residential placement facility in a district in which the student's parent or legal guardian does not reside. Districts may operate an extended-year program or use a private or public community-based dropout recovery education program to provide alternative education programs (AEPs) for students at risk of academic failure and dropping out of school.

FINDING

FWISD's *Ninth Grade Success Initiative* includes strategies designed to reduce the number of students who are retained in grade 9 or who drop out in that school year. Historically, there is a large increase in FWISD's student population from grade 8 to grade 9. This difference can partially be explained by the influx of private school students entering the system and the fact that a large number of ninth-grade students fail to meet the five-credit requirement to be reclassified as a tenth grader-FWISD *Dropout Report 1998*. **Exhibit 2-32** shows the substantially higher number of ninth-grade students compared to the numbers of students in grades 8, 10, 11 and 12. Student enrollment declined incrementally in grades 10, 11 and 12 each year.

Exhibit 2-32
FWISD Student Enrollment by Year and Grade for
Grades 8 through 12
1995-96 through 1999-2000

	Grade 8	Grade 9	Grade 10	Grade 11	Grade 12
1999-2000	5,524	6,664	4,868	4,027	3,764
1998-99	5,273	6,666	5,021	4,120	3,682
1997-98	5,179	6,704	4,793	3,938	3,520
1996-97	5,305	6,539	4,646	3,629	3,205
1995-96	5,141	6,501	4,367	3,338	3,048

Source: TEA AEIS reports for 1995-96 to 1999-2000.

FWISD recognized the needs of its at-risk population and made these needs an imperative in the 2000-2001 DEIP. Imperative 9 states that "student attendance and retention will be monitored and supported to ensure that district and state standards for attendance and dropouts are met and that all students meet high school completion/graduation requirements," and "appropriate alternative programs will be provided for dropout prone youth unable to succeed in the standard program for recovered dropouts."

FWISD applied for and received a *Ninth Grade Success Initiative* grant from TEA to assist the district in its efforts to reduce the number of students who are retained in grade 9 or who drop out in that school year. FWISD developed a project with these grant funds that is aimed at assisting grade 9 students at risk of not earning sufficient credits to advance to grade 10. The Fort Worth Board of Trustees voted to allocate \$1,655,548 in local funds to supplement the \$3.1 million awarded by the state.

Project Success, FWISD's grade 9 success initiative, involves from 188 to 426 students from 13 community high schools and four alternative schools. Major program components include math/reading tutors, after-school algebra, "I Can Learn" labs, graphing calculators, direct instruction in reading, "A+ Advanced Learning System" in science, TEKS/TAAS approach to social studies, parent/community workshops and a lending library for parents. The project will be implemented from March 2000 through August 2001.

The grant includes an external evaluation component that will monitor student success on targeted achievement measures. Objectives for grade 9 include a 5-percent increase in students passing end-of-course algebra exams, students completing Algebra I, students passing exit level mathematics in grade 10, students passing integrated physics and chemistry, students passing exit level science in grade 10, students passing geography, students passing exit level social studies in grade 10 and a 5-percent reduction in grade 9 retainees.

Other goals include: reducing the retention gap for ethnic minority and low income students; reducing the gap in dropout rates between Anglo and ethnic minority groups; and reducing the dropout rate/increasing the graduation rate for all students.

COMMENDATION

FWISD has targeted extra support services for grade 9 at-risk students through *Project Success*.

FINDING

Alternative education is provided for students who need assistance that traditional schools cannot provide and for students who have been removed from their schools through the third-party hearing process for violation of the district's code of conduct. The director of Alternative Schools supervises the district's three Disciplinary Alternative Education Program (DAEP) schools and five non-disciplinary Alternative Education Program (AEP) schools. The Department of Student Affairs oversees 11

contract DAEP sites. The DAEP schools and contract sites are discussed in Chapter 12 of this report.

FWISD has five non-disciplinary AEP schools. Descriptions of these schools follow.

New Lives School - This school is for pregnant or parenting students in Grades 6 through 12 who reside within FWISD. Students' classes are organized in four, nine-week sessions. During each session, students may achieve two high school credits for a total of eight high school credits per year. Students may take academic and elective courses. The focus of the school is to provide job-readiness training. Students also may attend extended day school (extension of the regular school day in order to provide additional instruction) three days a week to receive academic credits.

Success High School - This school is an evening non-disciplinary alternative high school for students who are recovered dropouts or at risk of dropping out of school and who lack the credits needed for graduation. The school has four nine-week semesters per school year and follows an accelerated block schedule. The school also offers independent study, pre-GED and GED classes. Limited English proficient (LEP) students have access to the school's Language Center program.

Accelerated High School - This ninth-grade school is for overage middle school students who lack the academic proficiencies to move on to high school. Students are organized into two teams and served by teachers in five academic areas including reading, language arts, mathematics, social studies and science. Students receive extra mathematics remediation or acceleration in the computer numeracy lab. Those with reading deficiencies participate in the Boys Town Reading Program. Science instruction is supported through computer workstations.

International Newcomer Academy - The academy serves recent immigrants in grades 6 through 12 who have been assessed as beginning learners of English by the FWISD Student Placement Center. In some cases, fifth-grade students who enroll at the end of the school year and have been in the United States less than four months may enroll at the school. Most students stay from one semester to a year; however, students who are pre-literate may attend the school for up to two years. Instruction is organized around themes and draws on the culture, language and life experiences of immigrant children. Students are oriented to the society and institutions of the United States and receive instruction in language, mathematics, social studies, science and elective courses. The goal is to successfully transition students to the Language Center at the student's home school.

Newcomer Career Academy - This academy is for high school immigrant students and provides a work-focused program. Students targeted for this school include those who are overage, do not have a strong educational background and who want to work. Instruction is integrated and organized around themes that include culture, language and life experiences of immigrant students as they relate to work. Students receive orientation to the country's society and institutions as well as academic instruction in English, mathematics, social studies, science, vocational courses and electives. It is expected that students will learn English and receive a high school diploma.

Success High School and the Newcomer Career Academy are housed at the same school. The International Newcomer Academy and Applied Learning Academy, which is a middle school Special Interest Program offered by Advanced Academic Services, also share a facility. The director of Alternative Schools said during TSPR interviews that the district is studying the possibility of expanding Success High School to provide day time services to students. The director noted some students work at night and could benefit from school services during the day.

COMMENDATION

FWISD provides specialized schools to meet individual student needs and ensure that students stay in school and succeed academically.

FINDING

Through the Alternative Education Professional Development Initiative, alternative education program staff members are trained in best practices that are related to teaching at-risk students. The initiative, funded through state compensatory education funds, began during the 1997-98 school year. Participants include teachers, student support services staff and administrators from FWISD alternative schools. Principals attend the training sessions to ensure a team atmosphere. Follow-up sessions include faculty meetings to share training ideas and successful practices, principal observations at other alternative schools and discussions of findings and student needs at the monthly alternative education administrators' meetings.

The coordinator of Community-Based Alternative Schools and the director for Alternative Education observe classrooms and provide feedback on implementing training strategies. In some cases, presenters provide technical assistance. Topics shown in **Exhibit 2-33** are determined for each school year based upon participants' comments at the end of the year. Training is provided to staff members at FWISD alternative schools as well as the staff at the disciplinary contract sites.

Exhibit 2-33
Alternative Education Professional Development Initiative Training
Topics

Year	Training Topic
1997-98	<p>Student Support Services Conflict Resolution Curriculum and Instructional Strategies Cooperative Learning Jr. Great Books</p> <ul style="list-style-type: none"> • Technology Education
1998-99	<p>Leadership</p> <ul style="list-style-type: none"> • Leadership for Change (Concerns Based Adoption Model) • Collaborative Process <p>Student Support Services</p> <ul style="list-style-type: none"> • Trainer-of-Trainer topics for schoolwide advisory programs (conflict resolution, life skills, self-discipline, de-escalating conflicts) • Small Group Guidance topics (anger management, peer mediation) • ACCESS/Parent University topics (parents, parents & students) <p>Curriculum and Instructional Strategies</p> <ul style="list-style-type: none"> • Cooperative Learning (Levels I & II) • Boys Town Reading Program • Technology Education • Technology (Plato's User's Group) • Project-Based Learning/Experiential Learning • Multi-Grade and Multi-Age Learning • Integration of Conflict Resolution
1999-00	<p>Leadership</p> <ul style="list-style-type: none"> • Diversity • Problem Solving <p>Student Support Services</p>

	<ul style="list-style-type: none"> • Anger management, anti-bullying, conflict resolution, life skills • Non-violent Crisis Management • Framework for Aggression • Recidivism factors (disciplinary AEPs) • Linkages with resources in the community (community agencies presentations) <p>Curriculum and Instructional Strategies</p> <ul style="list-style-type: none"> • Cooperative Learning (Kagan - ESL) • Technology (Plato User's Group) • Project-Based Learning/Experiential Learning • Multi-grade and multi-age learning • Boys Town Reading Program
2000-01	<p>Leadership</p> <ul style="list-style-type: none"> • Leadership for Improvement • Needs Assessments and Use of Data <p>Student Support Services</p> <ul style="list-style-type: none"> • How to Conduct and Manage Small Groups • Linkages with resources in the community <p>Curriculum and Instructional Strategies</p> <ul style="list-style-type: none"> • Cooperative Learning (Kagan - ESL) • Teachers New to Alternative Education • Win-Win Discipline & Harry Wong • Technology (Plato User's Group) • Boys Town Reading Program

Source: Fort Worth Independent School District Alternative Education Professional Development Initiative.

COMMENDATION

FWISD instructs staff members at alternative schools in research-based practices for meeting the unique needs of at-risk students.

FINDING

In FWISD, various district departments deliver services for students in at-risk situations, and even though student dropouts have been identified as a concern, the district's dropout rate exceeds the state and peer district rates. The district's dropout rate increased in 1998-99, while several peer districts and the state rate remained relatively stable.

Increased dropout rates for both Austin ISD and FWISD, which are shown in **Exhibit 2-34**, may relate to data quality problems for the previous year. TEA audited both districts for underreporting student dropouts during the 1997-98 school year. An independent review of FWISD school leavers conducted by Moak, Casey and Associates revealed administrative failures but no purposeful intent to mislead the state.

Exhibit 2-34
Annual Dropout Rates
FWISD and Peer Districts by Year

	1996-97	1997-98	1998-99
Fort Worth	2.5%	2.5%	4.3%
Austin	1.8%	2.0%	3.7%
Dallas	2.4%	1.3%	1.3%
El Paso	1.1%	1.3%	1.2%
Houston	2.8%	3.4%	3.9%
State	1.6%	1.6%	1.6%
Region 11	1.5%	1.4%	1.8%

Source: 1998-99 and 1999-2000 TEA AEIS reports.

Student demographic group dropout rates for peer districts are compared in **Exhibit 2-35**. FWISD has a higher dropout rate compared to the peer districts. The dropout rate for African American and Hispanic students exceeds all peer districts, with the exception of Austin ISD. The dropout rate for FWISD Anglo students is at least twice the rate for Anglo students in each of the peer districts.

Exhibit 2-35
Annual Dropout Rates by Student Demographic Group
FWISD and Peer Districts, 1998-99

	Fort Worth	Austin	Dallas	El Paso	Houston
All Students	4.3%	3.7%	1.3%	1.2%	3.9%

African American	4.9%	5.2%	1.3%	0.8%	4.5%
Hispanic	4.6%	5.2%	1.4%	1.4%	4.1%
Anglo	3.4%	1.6%	0.8%	0.7%	1.7%
Econ. Disadv.	2.2%	4.2%	1.0%	0.7%	2.3%

Source: 1999-2000 TEA AEIS reports.

In FWISD, various administrators have responsibility for at-risk students and dropout prevention. According to the 2000-2001 District Educational Improvement Plan, dropout prevention efforts include monitoring student attendance, organizing summer orientation for incoming secondary students, Project Success-a grade 9 TEA grant, Comprehensive Truancy Prevention Initiative, Because We Care, Communities in Schools, After-School Counseling-Centered Educational Support Services (ACCESS) and Parent College Information Nights. Various central office administrators oversee these programs.

Although FWISD has identified a number of initiatives aimed at dropout prevention, the district plan does not show how these efforts are coordinated. Furthermore, the desired outcomes/evaluation criteria are stated in very general terms: "Increase school attendance and reduce dropouts." Grant-funded programs (Project Success, the truancy initiative and Project Reach) are being evaluated, but there is no explicit connection between program effectiveness and dropout prevention and reduction.

During 1995-96, Houston ISD (HISD) created the Office of Student Retention Initiatives to develop programs to graduate more students and reduce the dropout rate; to study and analyze the effectiveness of the district's dropout prevention, intervention and recovery programs; and to develop an action plan that ensures the academic success of students at risk of dropping out. The office is staffed by one person who oversees the district dropout initiative, works with individual campuses and administrators to coordinate the initiative, and ensures campuses study their dropouts and determine why they dropped out. Each school must periodically review every student's progress and plan any necessary individualized improvements. Interviews by TSPR consultants with the Houston ISD assistant superintendent for Student Retention Initiatives indicate that HISD schools are experiencing success with this initiative.

In a similar move, the Austin ISD Dropout Prevention Task Force recommended creating a position on staff with the primary responsibility for dropout prevention. The task force recommended this person have full access to data, programs and the district's decision-making process. The

recommendation also stressed that the responsibility for dropouts should not be assigned to a general staff member as an additional duty.

Recommendation 18:

Create an Office of Student Attendance and Dropout Initiatives and hire a director.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent hires a director of Dropout Prevention/Reduction.	June 2001
2.	The director works with the director of Research and Evaluation to compile district data related to the FWISD dropout problem and to catalogue existing programs.	July 2001
3.	The director compiles a comprehensive list of the district's dropout prevention services and efforts, and consults with outside experts such as the University of Texas' Charles A. Dana Center and the United States Department of Education to identify research-based "best practices" regarding dropout prevention.	July 2001
4.	The director develops a proposal for a dropout task force including a broad range of participants from education, business, civic, law enforcement/juvenile justice, social service, ministry, parents and students. The director presents the proposal to the superintendent.	July - August 2001
5.	The director coordinates dropout prevention and reduction efforts, monitors student data collection, analyzes student data, monitors program effectiveness and works with individual campuses on attendance/dropout issues.	Ongoing

FISCAL IMPACT

A Dropout Prevention/Reduction director position should be added. The midpoint salary for a director with a 220-day assignment is \$67,241 a year along with benefits (\$1,860 plus 9.35 percent of salary) for a total of \$75,388.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Create an Office of Student Attendance and Dropout Initiatives and hire a director.	(\$75,388)	(\$75,388)	(\$75,388)	(\$75,388)	(\$75,388)

FINDING

FWISD has pursued programs and initiatives to eliminate its dropout problem, but the district's dropout rates remain unacceptably high for all student groups. As shown in **Exhibit 2-36**, FWISD's dropout rates increased over the past five years for African American, Hispanic and Anglo students. Early in 1990, FWISD released the *District Plan for Increasing the High School Graduation Rate, the Stay-in-School Program* to address its dropout problem. The *Stay-in-School Task Force Report* made some generic recommendations about dedicating additional resources to schools with the highest dropout rates. Since the release of the report, no evaluation efforts have assessed the effectiveness of the district's dropout prevention efforts, and student dropouts remain a critical problem.

Exhibit 2-36
FWISD Annual Dropout Rates by Year and Student Group

	1994-95	1995-96	1996-97	1997-98	1998-99
All Students	2.1%	2.4%	2.5%	2.5%	4.3%
African American	2.3%	3.0%	2.5%	2.4%	4.9%
Hispanic	2.8%	2.8%	3.3%	3.3%	4.6%
Anglo	1.3%	1.4%	1.7%	1.5%	3.4%

Source: FWISD Research and Evaluation Dropout Report 1998, and 1998-99 and 1999-2000 TEA AEIS reports.

Austin ISD created a community task force to assist the district in reducing the number of students who drop out. Task force members represent a wide range of community constituencies. AISD is committed to a five-point strategy to tackle the dropout problem:

- *Identify, monitor and account* for the performance of all students, especially those who have academic, attendance or behavior problems.
- *Prevent* students from falling behind academically.
- *Help* students who fall behind to catch up.
- *Provide* students and their families with support services.
- *Provide* a safe and nurturing educational environment in collaboration with parents and the community.

According to the Austin ISD superintendent, research indicates no single program or service has had a significant effect on school dropout rates.

Instead, what works are schoolwide strategies that involve the commitment of campus staff in collaboration with families small community.

Austin ISD's Dropout Prevention/Reduction Task Force was organized into six sub-committees to review issues related to the district's dropout problem. The task force then met as a whole committee to rank order their recommendations to determine priorities. In response to the task force, the superintendent arranged the priority recommendations into a set of proposed short-term and long-term action plans that are being implemented.

Recommendation 19:

Create a Dropout Prevention/Reduction Task Force including community, business, education and civic organizations.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent and director of Attendance/Dropout Prevention create the dropout task force with local representatives from education, business, civic organizations, law enforcement/juvenile justice, social service, ministry, parents and students.	July 2001
2.	The dropout task force meets over a two-month period to review and assess FWISD's dropout prevention and reduction initiatives and those planned for 2001-02. Two to three meetings may be required to complete this task.	October - November 2001
3.	The task force develops specific recommendations with cost estimates for a sustained community-wide effort to decrease the number of dropouts and increase the number of students who graduate from high school.	November - December 2001
4.	The superintendent and director create a Dropout Prevention/Reduction Action Plan for the district.	January - March 2002
5.	Administrative and school staff develop detailed implementation plans related to the Dropout Prevention/Reduction Action Plan within the district and school improvement plans.	March - May 2002

FISCAL IMPACT

This recommendation could be accomplished with existing resources.

FINDING

Although the number of counselors in FWISD meets state guidelines, information collected during the TSPR review shows that counselor activities do not comply with TEA-recommended time distributions for guidance, responsive planning and supportive services. Texas Education Code, Chapter 33, Subchapter A establishes requirements for school district counseling services. According to this section of the law, school districts with 500 or more students in elementary school shall employ at least one certified counselor.

TEC Section 33.006 describes the responsibility of the school counselor: "...to fully develop each student's academic, career, personal and social abilities." Counselors, in particular, are obligated to address the special needs of students who are at risk of dropping out of school, becoming substance abusers, participating in gang activities, committing suicide or in need of modified instructional strategies. Counselors also consult with a student's parent or guardian to make referrals as appropriate; consult with school staff, parents and other community members to promote student success; coordinate people and resources in the school, home and community; interpret standardized test results and other assessment data that help a student make educational and career plans; deliver classroom guidance activities; and serve as a consultant to teachers conducting lessons based on the school's guidance curriculum.

The State Board of Education's *1996-2000 Long-Range Plan for Public School Education* stresses that all Texas students should have equal access to developmental guidance and counseling programs. TEC Section 21.356 requires the commissioner of education to consult with state guidance counselor associations to develop and periodically update a guidance counselor job description and evaluation form. In response to this mandate, in 1998, TEA published a revised version of *A Model Developmental Guidance and Counseling Program for Texas Public Schools*. The revised developmental guidance model differs from historical models in that it moves counseling from a "reactive, crisis management" model to one that is "planned, based on priorities and preventative."

Information in **Exhibit 2-37** shows the state-recommended time distributions for counselors by grade level. Counselors in the elementary and middle schools are expected to spend more time teaching and assisting teachers with the developmental guidance curriculum. Across all grade levels, one-third or more of counselors' time should be devoted to the immediate personal concerns or problems of students-that is, to personal-social, career and/or educational development. Time devoted to individual student planning should increase by school level. The goal is for counselors to guide all students as they plan, monitor and manage their own educational, career and personal-social development. System support

activities should directly benefit students. For example, counselors should consult with teachers, promote parent/community relations and support school-based improvement.

Exhibit 2-37
State-Recommended Time Distributions for
Balanced Counselor Services

Services	Elementary Level	Middle School Level	High School Level
Guidance curriculum	35-45%	35-45%	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%
Non-guidance	0%	0%	0%

Source: A Guide for Program Development Pre-K-12th Grade (TEA, 1998).

The effectiveness of a district's guidance and counseling program is directly related to the counselor-to-student ratio within the program as well as the non-counseling duties assumed by counselors. The number of counselors needed to staff the program depends on the students' and community's needs, and according to TEA, should be sufficiently low to meet the district's identified, high priority needs.

Various organizations have proposed counselor-to-student ratios. The American School Counselor Association recommends an ideal ratio of 1:100 and a maximum ratio of 1:300. The Texas High School Counselor Association, Texas Association of Secondary School Principals and the Texas Elementary Principals and Supervisors Association have recommended ratios of 1:350. Low ratios, however, cannot be required by TEA because there is no state funding to support such a mandate. TEA considers adequate a ratio between 1:350 and 1:500.

Exhibit 2-38 shows the FWISD counselor-to-student ratios by school level. The student load for high school counselors (1:337) is substantially lower than the load for elementary and middle schools. Overall, FWISD's counselor-to-student ratios fall within TEA guidelines. Student loads in elementary and middle schools, however, exceed the 1:350 ratio recommended by professional educator associations for school counselors.

Exhibit 2-38
Counselor-to-Student Ratios for FWISD Schools

	Fort Worth ISD Student Enrollment	Number of Fort Worth ISD Counselors	Counselor-to- Student Ratio
Elementary School	41,830	92	1:455
Middle School	17,264	41	1:421
High School	19,529	58	1:337
Total	78,654	191	1:412

Source: FWISD Guidance and Counseling data chart.

The district teacher survey results shown in **Exhibit 2-39** suggest that FWISD counselors are more likely to provide crisis services and less likely to assist in school-level problem solving and counseling students for the future. Overall, only 40 percent to 60 percent of elementary, middle and high school teachers believed counselors were being used effectively in their school. Middle school teachers were more positive about counselors' roles than were elementary and high school teachers.

Exhibit 2-39
**District Teacher Survey on Effectiveness
Of Counseling Services**

	Elementary	Middle School	High School
Individual or group counseling is available for students who need it.	65.0%	79.0%	77.0%
Counseling services help prevent problems on my school.	56.0%	71.0%	55.0%
Counseling services are available for crisis situations.	68.0%	83.0%	78.0%
Academic counseling is available to help students plan for the future and improve academic performance.	41.0%	61.0%	71.0%
Counselors are used effectively at my school.	40.0%	61.0%	50.0%

Source: FWISD Research & Evaluation, Teacher Effectiveness Survey Results, 2000.

TSPR reviewed information from principal focus groups, as well as interviews with principals, counselors and the director of Counseling, which yielded insights about the counselors' current roles in FWISD schools. Secondary principals and several counselors reported that counselors in secondary schools spend more time acting as test coordinators/data clerks than fulfilling their counseling role. Individuals reported that counselors assumed the primary responsibility for administering the TAAS, district benchmark assessments and several other required assessments. This leaves less time for counselors to advise, counsel and build personal relationships with students.

Some campuses in the district already employ test coordinators. In those schools, counselors were more likely to be fulfilling their professional counseling role. Commendably, FWISD has contracted with the McKenzie Group consulting firm to perform a comprehensive evaluation of the Department of Guidance and Counseling as well as other related programs. The study was begun in December 2000 and will conclude with recommendations before August 2001.

Recommendation 20:

Assign non-counseling duties currently performed by counselors to other school or district personnel.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The associate superintendent for School Operations directs principals to review existing counselor duty assignments for elementary, middle and high schools to identify non-counseling related activities.	October - November 2001
2.	The associate superintendent for School Operations and principals transfer all non-counseling duties to other school and district personnel.	December 2001 - January 2002
3.	The associate superintendent for School Operations and director of counseling move toward compliance with the TEA-recommended time distributions for balanced counselor services.	December 2001 - January 2002
4.	Counselors are relieved of all non-counseling duties and begin to move toward compliance with TEA-recommended standards.	August 2002

FISCAL IMPACT

This recommendation could be implemented with existing resources.

Chapter 2

EDUCATIONAL SERVICE DELIVERY

D. Compensatory Programs

Funding for compensatory education programs comes from both federal and state sources. The federal *Elementary and Secondary Education Act of 1965* was reauthorized in 1994 as the *Improving America's Schools Act*. Title I, Part A of this act provides federal funds for students who are not meeting state performance standards (i.e., passing the TAAS tests). Federal Title I, Part A funds flow through TEA to districts and schools based on the number of economically disadvantaged students. Student disadvantage is based on eligibility for the national free and reduced-price lunch program. Federal law allows a school to be designated as a Title I, Part A schoolwide program if 50 percent or more of the students in the school or in an attendance zone are low income. Districts can also get a TEA Education Flexibility Partnership Demonstration Program (Ed-Flex) waiver to allow a school to become a Title I, Part A schoolwide program if it does not meet the student family income criteria. Compensatory education programs may also be referred to as "accelerated instruction."

Federal funds are required to be supplementary, that is, these funds must add services and programs to the regular education program and not supplant or replace regular education funds. Federal funds must also be supplementary to state compensatory education funds. In FWISD, elementary and middle schools with 60 percent or more economically disadvantaged students are designated as Title I, Part A schoolwide programs. The total number of schools served is 63, including 11 middle schools that operate under Title I, Part A Ed-Flex waivers.

State compensatory education is defined by law as programs and/or services designed to improve and enhance the regular education program for students at risk of academic failure or dropping out of school. The purpose is to increase the academic achievement of identified students and reduce the dropout rate.

Texas Education Code, Section 29.081 requires each district to develop appropriate compensatory or accelerated programs for students who are not passing the TAAS tests or at risk of dropping out of school. To determine the appropriate program and/or services, districts must use student performance data from the TAAS and other relevant assessments to design instructional services to accelerate student learning. Based on a comprehensive needs assessment, district and school staff must design appropriate strategies and include them in the school and/or district educational improvement plan. School districts must also evaluate and

document the effectiveness of their compensatory education programs for students at risk of academic failure and dropping out of school.

By law, the district improvement plan must include a comprehensive needs assessment, measurable performance objectives, identified strategies for student improvement, identified resources and staff in detail by school or organization, specified timelines for monitoring each strategy and formative evaluation criteria. Each district is responsible for evaluating the effectiveness of their locally-designed program for at-risk students. State compensatory education resources must be redirected when evaluations indicate that these programs and/or services are unsuccessful in improving student achievement and reducing school dropouts.

FINDING

FWISD's organizational structure and the decision-making process used to allocate and coordinate federal and state compensatory education funds are inadequately aligned and defined. FWISD's organizational system places the Office of Federal and State Compensatory Education under the associate superintendent of Instruction-Area II. The Office of Federal and State Compensatory Education is headed by an administrator; however, the title for the office is misleading. The administrator reported in TSPR interviews that the office is responsible for the administration of federal Title funding (Title I, Part A; Title II, Part B; Title IV; Title VI) and Impact Aid; however, State Compensatory Education (SCE) funds are not under the administrator's control.

The TSPR review of district documents showed that FWISD has well-defined procedures in place to ensure that Title I, Part A funds support economically disadvantaged students. Yearly evaluations are conducted to monitor student learning outcomes. In FWISD, all eligible Title I, Part A schools are schoolwide programs. Schools qualify for these federal funds based on projected enrollment and the number of economically disadvantaged students.

Schools are placed into four tiers: 90-100 percent, 80-90 percent, 70-80 percent and above 60 percent economically disadvantaged student enrollment based on national free and reduced-price lunch program eligibility. In 2000-2001, Title I, Part A funds were allocated to 63 schools, including 49 elementary and 14 middle schools, across the four tiers. Eleven middle schools operated under Title I, Part A Ed-Flex waivers. Per-student allocations, in order by the extent of student poverty in a school, were \$290, \$240, \$190 and \$140. Additional federal funds were allocated to five non-public schools, six schools for neglected and delinquent students, and two alternative education schools.

The FWISD federal programs staff assists schools with their Title I, Part A program decision making process. Detailed forms and explanations guide principals step-by-step through Title I, Part A program requirements. All School Planning Committee members must sign a document attesting that they participated in planning meetings. Each school receives a detailed budget summary that outlines their Title I, Part A program selections and the average cost for salaries and benefits. District Research and Evaluation staff provide school-level summaries of achievement data. Staff are guided to align their Title I, Part A plan with the Campus Educational Improvement Plan (CEIP). The FWISD federal programs office collects data for each Title I, Part A schoolwide program that summarize the services that will be implemented during the current school year.

Exhibit 2-40 shows that program efforts at schoolwide campuses are augmented by various district initiatives that are supported with Title I, Part A funds. The district-level initiatives are approved by the Executive Council, superintendent and Board of Trustees. Use of campus funds is determined by the principal and the Title I Planning Committee and approved by a Title I Review Committee, which forwards its recommendations to the superintendent.

Exhibit 2-40
Title I, Part A Federal Compensatory Education
Program Expenditures 2000-2001

Program	Budgeted Amount	Number of Students Served
Title I Reading Coordinator	\$100,000	39,362
Title I Math Coordinator	\$100,000	39,362
Reading Recovery	\$662,904	425
Secondary Reading	\$1,189,089	10,373
Computer Assisted Instruction (CAI)	\$2,377,868	34,843
Elementary Resource Teachers	\$4,886,120	28,989
Support Teachers	\$730,000	39,362
Summer Roundup	\$235,878	1,738
Four-Year-Old Early Childhood	\$4,735,515	1,392
Three-Year Old	\$279,304	217
Baby Buggy (parent support program)	\$221,538	2,250
Parental Involvement	\$341,376	39,362

Neglected and Delinquent	\$43,578	81
Parochial School CAI	\$156,300	300
Parochial Parent Involvement	\$2,920	300
Homeless	\$50,000	2,500
Total Program Cost	\$16,112,390	
Admin, Supervision, Spec. Services	\$835,481	
Evaluation Component	\$455,516	
Summer Math Institute	\$190,000	
Total Other Costs	\$1,480,997	
Indirect Costs	\$386,583	
Total Program Cost	\$17,979,970	

Source: FWISD Federal Program Office document.

Although policies and procedures for federal compensatory funding were well documented, there was little evidence to show how planning and budgeting decisions were made about the allocation of state compensatory education (SCE) funds. Data reported below came primarily from a list of SCE programs provided by the administrator of compensatory funds and information gathered from the DEIP and CEIPs for selected schools.

The director of Federal and State Compensatory Education has no responsibility for SCE funds, so staff were unaware of procedures used to select programs or to allocate resources for SCE programs and services. The office's *ESEA SIA Title I SCE* campus planning documents for schoolwide programs referred to the coordination of federal and SCE funds. According to the documentation, the district's priorities for compensatory education are reading, mathematics and English language arts.

Exhibit 2-41 shows districtwide initiatives supported by SCE funds for 2000-2001. Data were based on the DEIP and information provided by the Office of Federal and State Compensatory Education. A district superintendent reported that each principal receives a handout with their SCE budgetary information; however, no formula is provided to show how funds are allocated to each school.

Exhibit 2-41
Districtwide Initiatives Supported By

**State Compensatory Education Funds
2000-2001**

Program	Description	Budgeted Amount
Tutoring Initiative	Recruit and train tutors	\$722,191
Reading Initiative	Funds allocated to schools for reading	\$1,289,726
Math Initiative	Funds allocated to schools for mathematics	\$635,325
Early Literacy Program	Early literacy for childcare providers	\$200,000
Parents as Teachers (PAT)	Support for families	\$546,700
After-School Programs	Tutorials, sports, child care, clubs, etc.	\$4,526,116
Summer School/Intersession	Staff development for teachers	\$822,229
School Age Pregnancy	Maintain coordinator/develop programs	\$111,460
Because We Care	Prevention specialists/secondary schools	\$861,366
Behavior Intervention Spec.	Secondary schools	\$193,493
UMOJA/Communities in Schools	Preventive interventions	\$549,000
Middle-school tutoring	Six low-performing middle schools	\$23,700
Quality Funds (low-performing)	Based on TAAS performance previous year	\$595,325
Transitional Schools	Sustained support for low-performing school	\$191,400
Elementary Schools Initiative	Extended year funded with SCE	\$2,122,424
Alternative Schools	Allocate funds to alternative schools	\$224,317
Alternative Education	In-district	\$3,733,097
Alternative Education	Contracted	\$2,785,759
Home visits for truants	School attendance officers	\$409,495

Source: FWISD Office of Federal Programs document and DEIP, 2000-2001.

The TSPR review of a sample of CEIPs revealed that each plan included a section entitled "Use of State Compensatory Funds for Improved Achievement of Students in At-Risk Situations." Programs and services varied somewhat by school and grade level. Most plans included these elements: staff FTE allocations, Tutorials, Reading Initiative, Math Initiative and Because We Care. CEIPS included funding sources and amounts (Title I/SCE), but they did not specify the students to be served or identify measurable student outcomes for the specified programs.

State Board of Education rules for financial accounting require school districts to follow specific guidelines on reporting and allocating state compensatory education funds. The rules (TAC Section 109.25) state, "Each district shall ensure that supplemental direct costs and personnel attributed to compensatory education and accelerated instruction are identified in district and/or school improvement plans at the summary level for financial units or schools. Each district shall maintain documentation that supports the attribution of supplemental costs and personnel to compensatory education. Districts must also maintain sufficient documentation supporting the appropriate identification of students in at-risk situations, under criteria established in TEC Section 29.091." Examination of FWISD's DEIP revealed that insufficient detail was included to account for state compensatory fund expenditures.

Texas Education Code (TEC), Section 11.252 states that a DEIP must include a needs assessment and a detailed, measurable plan for improvement. TEC, Section 11.252 also states that a DEIP must include "a comprehensive needs assessment; measurable district performance objectives; strategies for improvement of student performance; resources needed to implement identified strategies; staff responsible for ensuring the accomplishment of each strategy; timelines for ongoing monitoring of the implementation of each improvement strategy; and formative evaluation criteria for determining periodically whether strategies are resulting in intended improvement of student performance."

FWISD's DEIP did not contain sufficient detail in the area of specific performance objectives. Statements in FWISD's plan included only general statements such as "improved TAAS scores" and "teachers become proficient in assessing students." Furthermore, FWISD's DEIP does not specify whether compensatory education funds are used to supplement, rather than supplant, the regular education program. Title I, Part A (federal compensatory education) and state compensatory

education funds are used to support district initiatives that are under the direction of various district administrators.

Killeen ISD has developed and implemented a site-based budgeting procedure that gives the principal and staff at each school the authority to determine how compensatory education funds are used. Using clearly formatted, easy to understand packets, Campus Improvement Committees have all the information they need to determine how they can spend their money and supply all the necessary information for approval. Packets are color-coded by funding source to make it easy for faculty and central office personnel to keep the funding streams separate.

Ysleta ISD allocates federal Title I, Part A and SCE funds to schools based on the number of students eligible for free and reduced-price lunches. These funds are used to provide additional teachers, materials, training and other services. YISD has implemented a site-based budgeting procedure that gives the principal and staff at each school full authority to determine how Title I, Part A and SCE funds are used. Student performance targets are set and funds are allocated to each school on a per-capita basis for eligible students. Schools determine how the funds will be spent, within the law's requirements, to attain the targets. Title I, Part A and SCE funds are fully integrated into the planning, budgeting, and operating process and are focused on improving targeted students' performance on TAAS.

Recommendation 21:

Combine the budgeting and planning functions for federal (Title I, Part A) and state compensatory education in one office under the associate superintendent of Instruction.

FWISD has adequate procedures in place for federal compensatory education (Title I, Part A) funds, however the budget allocations and procedures for state compensatory education need to be more clearly defined. In order for this to happen, federal and state compensatory funding and programs need to reside in one district office. Moreover, planning for compensatory education should be integrated within the campus educational improvement planning process.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent evaluates the proposed organizational structure against current positions and individuals.	June 2001
2.	The superintendent develops an organizational plan for federal and state compensatory education that fits within the district	July 2001

	organizational plan.	
3.	The associate superintendent redefines the job description for the director of Federal and State Compensatory Funds.	August 2001
4.	The superintendent makes the organizational changes.	August 2001

FISCAL IMPACT

This recommendation could be implemented with existing resources.

FINDING

There was inadequate evidence to show how state compensatory education funds addressed the primary needs of FWISD students in at-risk situations. As stated previously, according to TEC, Section 29.081, "Each school district shall evaluate and document the effectiveness of the accelerated instruction in reducing the dropout rate and in increasing achievement in the categories of students listed under Subsection (d)." Measurable performance objectives that are relevant to students' educational progress must be included in the district or campus improvement plan.

FWISD's DEIP did not contain sufficient detail in the area of specific performance objectives. The FWISD improvement plan included general statements such as "increased TAAS scores" and "reduce the number of students who are retained." The TSPR review of a sample of CEIPs revealed that each plan included a section entitled "Use of State Compensatory Funds for Improved Achievement of Students in At-Risk Situations." Programs and services typically included staff FTE allocations, Tutorials, Reading Initiative, Math Initiative and Because We Care. CEIPS included funding sources and amounts, but they did not specify the students to be served or identify measurable student outcomes for the specified programs.

Killeen ISD uses a system of self-evaluation and peer review to measure success. Through a process called Results Based Monitoring (RBM), KISD schools conduct ongoing monitoring to assess the success of services funded by federal Title I funds and SCE funds. The process ensures that compensatory education funds are being used appropriately, and if students are not improving academically, the campus takes responsibility for redirecting funds immediately to improve student achievement. The peer review is conducted in the spirit of comprehensive campus improvement to provide support for the campuses and to supply objective data and observations that can be used when campuses evaluate existing programs for the CEIP. The Office of Compensatory and Federal Programs organizes a committee to identify and visit low-performing

schools. Schools conduct a self-evaluation in March or April followed by a peer view site visit in October or November. The site visit committee typically consists of a principal, assistant principal, district instructional specialist and campus instructional specialist.

The committee reviews all the documents used to identify the school as low-performing and perform the campus self-evaluation. During the site visit, the committee uses a standard set of questions to interview administrators, teachers and other participants in the program. **Exhibit 2-42** illustrates sample questions asked during the peer review. The peer review committee provides a summary of identified strengths and concerns, discusses student assessment data and makes recommendations for improvement.

Exhibit 2-42
Sample Program Evaluation and Campus Plan Questions
For Killeen ISD Compensatory Education Peer Review

Program Questions	Campus Plan Questions
What is the instructional focus?	Does the plan promote creative use of resources?
Is instructional focus aligned with the campus improvement plan?	Does the plan call for continuation of activities only when there is evidence of progress?
What assessment data is used to evaluate the program?	How were (high school) students involved in the development of the plan?
How and how often do special program staff and regular education staff work together to design and implement lessons?	Does the plan ensure that school personnel will have adequate opportunities to work together and learn from each other?
Are parents actively involved in the program?	
What services does the parental liaison provide to families that supplement, enhance, and improve student achievement?	

Source: Killeen ISD Compensatory Program Evaluation Handbook.

FWISD initiated a Quality Review Team initiative in spring 2000. The team has five employees who perform evaluations of schools. The team

reviews six areas (Leadership, School Climate, Planning and Monitoring, Professional Development, Classroom Teaching and Learning, and Family and Community Involvement). A confidential report is prepared and submitted to the school principal and area director. To date, two Quality Review Team reviews have been conducted.

Recommendation 22:

Incorporate a review of compensatory education programs within the Planning and Monitoring function of the district's Quality Review Team responsibilities.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent instructs the director of Compensatory Education and Title I program evaluators to work with the members of the Quality Review Team to incorporate compensatory education indicators into the quality review process.	June 2001
2.	The director of Compensatory Education, Title I program evaluators and Quality Review Team members develop a school compensatory education self-evaluation protocol.	July 2001
3.	The Quality Review Team members revise quality review protocols to include compensatory education indicators and submit the revised protocols for review to the director and compensatory education staff.	August 2001
4.	The Quality Review Team conducts reviews of low-performing schools.	October-November 2002

FISCAL IMPACT

This recommendation could be implemented with existing resources.

Chapter 2

EDUCATIONAL SERVICE DELIVERY

E. Advanced Academic Services

The Advanced Academic Services Department, formed in February 1999, coordinates services for high achieving students. Its mission is to "guide students toward achieving their fullest academic potential." Key components of all advanced academic programs are talent development and instructional differentiation. The newly formed department consists of a director, one high school coordinator, one middle school coordinator, two elementary coordinators and one special programs coordinator. The department is responsible for the gifted education program as well as services for those students who are academically advanced but do not meet all of the district criteria for gifted students.

All school districts in Texas are required to identify and provide services for gifted/talented students. The State Board of Education (SBOE) has adopted a state plan, the *Texas State Plan for the Education of Gifted/Talented Students*. The state plan serves as a guide for meeting the law's requirements and includes acceptable, recognized and exemplary criteria in the areas of student assessment, program design, curriculum and instruction, professional development and community involvement.

Students identified as gifted can participate in FWISD's gifted programs. In addition, students not identified as gifted may qualify for gifted classes based on teacher recommendation, parental approval, student interest or classroom performance. The department staff identify gifted/talented students using multiple criteria. The department's brochures explain the identification process for gifted services as well as the programs available to students.

FWISD strives to nurture all students' talents and, while it follows the state plan for gifted education, tries to expand services to students who meet some, but not all, gifted criteria to ensure all students are appropriately challenged and are receiving differentiated instruction based on individual needs. Curriculum and instructional delivery methods are differentiated to reduce unnecessary redundancy for gifted students. In addition, teachers of the gifted emphasize independent study investigations, depth and complexity and tiered assignments. Teachers also match activities to students' individual learning styles and interests. The department is developing documents to accompany the *Pathways to Excellence* curriculum guides to extend the FWISD required curriculum for gifted learning. Gifted and high achieving students are also encouraged to earn the seal for the State Board of Education's Distinguished Achievement Program, which includes conducting an original research project.

The state plan for gifted education specifies districts "assure an array of learning opportunities that are commensurate with the abilities of gifted/talented students, and that emphasize content in the four (4) core academic areas." FWISD gifted students receive services in the four core academic areas (English Language Arts, Mathematics, Science and Social Studies). Classroom instruction is designed to ensure adequate time for students to work with other children of advanced ability.

Students are provided learning experiences through differentiation of course content designed to meet their diverse needs. All teachers in FWISD gifted programs are certified or endorsed in gifted education. Extra options provided to gifted students include academic fairs and competitions, creative problem-

solving competitions, Saturday and summer enrichment classes, UIL academic competitions and SAT preparation courses.

The elementary gifted education program services include the self-contained High Academic Program (HAP) in second through fourth grade; clusters of identified gifted learners in grades 1 and 5 in classes taught by gifted education certified teachers; enrichment offerings and pullouts for grades 1 and 5; kindergarten pullouts and enrichment services after March 1 of the school year; and enrichment clusters in kindergarten through grade 5 based on student interests.

The goal of HAP is "to provide opportunities for students to engage in learning experiences that reflect more complex and in-depth understanding." HAP strategies include acceleration of the required classroom curriculum, concept-based teaching, high-level questioning and thinking skills, independent investigations and research as well as student projects.

The program allows students to be academically challenged at their home campus, rather than leaving their home campus to participate in a separate Special Interest Program. At least half of each HAP class is made up of gifted students. If space permits, high-achieving students who are not identified as gifted are placed in the HAP classes. These students meet some, but not all of the gifted criteria. The HAP program will be extended to grade 5 during the 2001-02 school year. The elementary principals interviewed by TSPR, individually and in a focus group, said that the HAP program has offered greater flexibility for students to choose between staying at the home campus or entering one of the Special Interest Programs. These principals were positive toward the HAP program and liked keeping more gifted students at their home school.

Gifted students in grade levels without HAP are served within the regular classroom and placed with a gifted education certified teacher who extends the curriculum for gifted students. These students also participate in a pull-out class that meets two hours a week. In the pull-out program, students may examine social studies and science and its relationship to them, extend their knowledge with activities that provide for complex learning, select classes based on a topic or field of interest, explore personal interest areas while working with a mentor and learning skills of a practicing professional and share new knowledge by developing a product.

Kindergarten students who are identified for gifted services begin enrichment after March 1 of each year. Other enrichment offerings available to elementary students include a history fair, a science fair, Invention Convention, DestiNation Imagination and Imagination Celebration.

At the middle school level, the gifted program consists of Honors classes in English language arts, mathematics and science. For social studies, gifted learners are grouped together and combined in a class with non-gifted students and taught by a gifted certified teacher. Middle school gifted students may receive three years of instruction in two years and earn high school credit in the eighth grade. Gifted middle school students are also given credit by examination opportunities and can participate in the Duke Talent Identification Program.

The gifted program for high school students consists of Honors classes, Advanced Placement classes and concurrent/dual enrollment in college courses. Gifted high school students may also participate in a class that includes an original research project in order to complete requirements for the state's

Distinguished Achievement Program diploma. Honors and AP classes are vertically aligned (coordinated across elementary, middle and secondary grade levels) in order to ensure consistently high academic standards. Students may qualify for college credit upon completion of AP classes. FWISD provides financial assistance to students who cannot afford to pay for the AP tests.

In addition to gifted education programs at the home school, gifted students at all grade levels have the option of attending Special Interest Programs (**Exhibit 2-43**). All Special Interest Programs share an advanced, rigorous curriculum, and each program has a unique specialization area. According to the director of Advanced Academic Services, some Special Interest Programs are more rigorous than others; however, students may choose programs based on their areas of interest. Parents complete a uniform application for the Special Interest Program and rank the programs that are of interest. A committee from each program selects students and tries to match them to the program of their choice.

Exhibit 2-43
FWISD Special Interest Programs
1999-2000

Special Interest Programs	
Elementary	Luella Merrett Advanced Academic Program Como Montessori Daggett Elementary Montessori Morningside Elementary Science, Mathematics, Technology Program Spanish Immersion School at T. A. Sims Elementary Alice Carlson Applied Learning Center
Middle	Daggett Middle School Montessori Middle School of Math, Science, and Communication at Dunbar J.P. Elder Academy of Science and Mathematics William James College Readiness Academy Morningside International Academy
High	High School for Science & Engineering Professions at Dunbar High School for Medical Professions at North Side High School for Finance & Communication at Polytechnic International Studies at O.D. Wyatt High School Government and Law at Eastern Hills High School

Source: Advanced Academic Services Brochures.

FINDING

Based on the recommendations of an external gifted education expert and an internal needs assessment, a new nomination, screening and identification process for elementary, middle and high school gifted/talented students was developed and implemented during the 1999-2000 school year. The goal of the new process is to allow more ethnic and language minority students the opportunity to demonstrate their skills and abilities in order to be considered for the gifted education program. This process, which

includes more identification criteria and a language-free culturally fair identification instrument, is similar at all grade levels; however, there are slightly different identification criteria for kindergarten, grades 1 through 5, grades 6 through 8 and grades 9 through 12. The new identification process looks at multiple criteria over time. All kindergarten and grade 1 students take the Naglieri Nonverbal Ability Test (NNAT) to ensure that no students are overlooked in the nomination process. The kindergarten nomination, screening and identification process is displayed in **Exhibit 2-44**.

**Exhibit 2-44
FWISD Gifted and Talented Nomination, Screening
and Identification Process**



The nomination, screening and identification process for the other grade levels is similar to kindergarten, but the FWISD staff nomination instruments and multiple identification criteria differ. The FWISD uses several staff nomination instruments and identification criteria as displayed by grade level in **Exhibit 2-45**.

Exhibit 2-45
Gifted/Talented Staff Nomination Instruments and Identification Criteria

	FWISD Staff Nomination Instruments	Multiple Identification Criteria
Kindergarten	Screening Jot Sheet Naglieri Nonverbal Ability Test (NNAT)	NNAT Scales for Rating Behavioral Characteristics of Superior Students-Revised (SRBCSS-R) Student Portfolio/Student Performance
Grades 1-5	Screening Jot Sheet Stanford-9/Aprenda NNAT (Grade 1)	NNAT (Grades 2-5) SRBCSS-R Student Portfolio/Student Performance
Grades 6-8	Screening Jot Sheet Stanford-9/Aprenda	NNAT SRBCSS-R Student Portfolio/Student Performance
Grades 9-12	Screening Jot Sheet	Released PSAT test or NNAT for LEP students SRBCSS-R Student Grades and Grade Point Average

Source: FWISD Nomination, Screening and Identification Process.

During TSPR focus group meetings, elementary and secondary principals said that the new identification process has been useful. Elementary principals reported that the NNAT, a language-free, culturally fair measure, has been helpful for identifying gifted ethnic and language minority students. Testing all kindergarten and first-grade students on the NNAT began during spring 2000. The elementary principals in the group said that the identification process has improved since more criteria are used and all teachers are trained to identify gifted students.

COMMENDATION

FWISD revised their gifted education identification process to ensure more ethnic minority students who are gifted are identified.

Chapter 2

EDUCATIONAL SERVICE DELIVERY

F. Special Education Program

FWISD's mission statement for special education says, "The Special Education Department in conjunction with the district's statement of Philosophy and Commitment supports the district's focus on academic achievement and vocational training for all students."

The Special Education Services Department was assigned to the Operations Division during 1998-99 to establish closer communication and collaboration with elementary and secondary operations. The department reorganized during the 1999-2000 school year and now includes a director, three area directors, five program coordinators and a special services budget coordinator. Program coordinators coordinate homebound and hospital services, Child Find (a comprehensive system to identify students from birth to age 21 with disabilities or developmental delays), surrogate parents, extended school year services, records/data, the Special Education resource system, itinerant (traveling special education staff) services, and speech therapy or related services. The director of Special Education conducts monthly meetings to ensure consistency in the department's roles and responsibilities.

The federal Individuals with Disabilities Education Act (IDEA) requires all children with disabilities to receive a free, appropriate public education. In addition, the law requires each student with a disability to have an Individualized Education Plan (IEP) and be provided an education in the least restrictive environment. The federal law mandates that an IEP must be aligned with the general education curriculum and that regular education teachers are included in the IEP's development.

Students in FWISD are mainstreamed (instructed in the regular education classroom) whenever possible to ensure they are placed in the least restrictive environment. Special education instructional support services are provided at each FWISD school based upon the individual needs of students. Services are provided in the regular education classroom or in small learning groups for a portion of the day with specialized staff. FWISD provides all services within the district and does not send students elsewhere for services. FWISD's Regional Day School for the Deaf serves eligible FWISD students and students from seven neighboring school districts.

FWISD has two self-contained special education schools with their own principals. The departments of School Operations and Special Education

share the management of the schools. The Jo Kelly Special Education School provides extensive support to students of all ages who are medically fragile and have multiple disabilities. Boulevard Heights School serves students with a combination of severe learning and behavioral problems that require intensive intervention.

Regular education teachers are involved in deciding to which campus children are assigned, and they participate in Admission, Review and Dismissal (ARD) meetings. When IEPs are developed, the general curriculum is considered; however, some students require IEPs that focus on daily living and self-help skills as well as functional academics, which may be aligned with the general curriculum. Staff members receive training in general curriculum issues as well as the district reading initiative.

Services available to all special education students include speech/language, resource room (a room that serves disabled students' needs to learn specific skills within the least restrictive environment for part of the day), content mastery, occupational and physical therapy as well as adapted physical education services. Opportunities provided for secondary students include a college internship, vocational adjustment cooperative high schools, Preparing for Real Employment Possibilities (PREP), community laboratory classes and the Career Exploration Summer Program. Specialized services also are available in designated schools to meet specific student learning needs including behavioral improvement, visual enhancement/adaptation, hospital and homebound services, the Preschool Program for Children with Disabilities and a program for the deaf.

FWISD hired an outside consultant, Dr. Ruth Turner, to review the Special Education Services Department during the 1998-1999 school year. This report's findings and recommendations serve as the strategic plan for the Special Education Services Department. Dr. Turner is performing a follow-up evaluation to determine how successful the changes have been for FWISD students.

FWISD has developed a process to help parents and teachers work with students experiencing difficulties at school, entitled Supporting Teachers in Effective Problem Solving (STEPS). Students can be referred for special education at any time; however, STEPS helps teachers and parents work together to meet students' needs through an intervention plan.

The counseling department is responsible for the STEPS training to ensure that students are not automatically referred to special education. When a teacher has a concern about a student, a series of steps are in place to help

the teacher find solutions before automatically referring the child for special education testing.

A designated support person, such as the counselor, psychologist or instructional specialist helps the teacher review the child's records, observes the child and works with the teacher to develop ways to meet the child's needs. The teacher maintains a portfolio of student work samples, available student records, observation information and other documentation. If the strategies are viewed as ineffective by the teacher and designated support person, a STEPS meeting is held. An administrator, the teacher, the counselor, and other personnel familiar with the student attend. The parent also attends if possible. The STEPS committee reviews the student's records and develops an intervention plan to address the student's needs and establishes a timeline to review the plan's effectiveness. If the plan is not successful, a special education referral may be necessary. Principals and teachers interviewed said the STEPS process has reduced the number of students referred for special education services.

FINDING

A 1999-2000 evaluation of the district's special education programs by Dr. Ruth Turner, titled *Special Directions: A Comprehensive Analysis of Special Education Services*, reported that "the current Special Education assessment process is fragmented, inefficient and has not resulted in a high level of compliance or quality services." As a result, the Special Education Services Department restructured school-level support during the 1999-2000 school year. In the past, special education diagnosticians, supervisor diagnosticians and psychologists were divided among 10 to 12 schools and had different roles in assessing students for special education services.

To provide more cohesive services to students, the three roles were combined into one and staff members were assigned to fewer schools. During the 1999-2000 school year, there were 60 diagnosticians and psychologists serving the schools. Every school had either a half-time or full-time diagnostician or psychologist. The changes were made to ensure integrated services to students. Now diagnosticians and psychologists can spend more time with students. The change also has improved the assessment, ARD and IEP processes. In past years, the diagnosticians and psychologists focused on assessment. Now that they are housed at local schools, psychologists perform more interventions and consult more with teachers and students. National consultants provide training to diagnosticians and psychologists in the new intervention model. The outside consultant will be assessing the changes.

COMMENDATION

FWISD has taken steps to ensure students with disabilities receive coordinated assessment and follow-up.

FINDING

The planning and scheduling process for special education is inefficient and limited due to the lack of adequate, timely information on student enrollment. Special education central office administrators and campus administrators maintain current information about class sizes to determine if the numbers are growing disproportionately in any area. The reports they receive do not include information on the specific disabilities of students. Since some disabilities require more individual help than others, the administrators need to know more about specific student needs. The new student information system, SASIxp, provides the necessary information, but the administrators do not receive this information.

The director of Special Education said FWISD is working to determine how to make staffing decisions based on ratios of students to teachers and that the district needs to add teachers or teacher assistants when classes grow beyond certain numbers or conditions.

Recommendation 23:

Create monthly special education SASIxp reports by school, teacher and student that include specific disabilities of students to ensure adequate planning and staffing of FWISD Special Education programs.

The staff in Information Services and Special Education need to work together to use the district's available special education data. The special education central office administrators need to know what data is available and request information to ensure more efficient planning for school staffing and program needs.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Special Education works with the Information Services Department to determine what information should be provided in monthly SASIxp reports.	June 2001
2.	Information Services staff creates a customized report.	July 2001
3.	The director of Special Education reviews the report to ensure it provides the necessary information. Information Services modifies the report if needed.	July 2001

4.	Information Services provides monthly reports to the director of Special Education.	Monthly
5.	The director of Special Education reviews reports monthly and adjusts staffing to match student needs.	Monthly

FISCAL IMPACT

This recommendation could be accomplished with existing resources.

FINDING

FWISD's special education paperwork and Medicaid billing are not automated. The executive director of Special Services said in TSPR interviews that special education staff members have excessive paperwork. Also, the executive director for Special Services is exploring options to maximize Medicaid reimbursements and believes that the district should be able to recover more from Medicaid than is currently received. Medicaid funds received by FWISD go into the general fund for the district rather than directly to the Special Education department. For the 1999-2000 school year, FWISD received \$528,278.27 from Medicaid Administrative Claiming (MAC), \$523,993.03 from School Health and Related Services (SHARS), and \$393,179.43 from the State of Texas Access Reform Program (STARS). Automated systems in other school districts, which are discussed as follows, serve to increase special education program compliance, increase Medicaid reimbursements and decrease paperwork.

Baltimore City Public School System in Baltimore, Maryland purchased the Special Education Tracking System (SETS) in 1996 in response to the requirements of a federal consent decree. The district recently reached a long-term settlement to this consent decree. SETS software is a tool for improving compliance, outcomes and measuring improvement. SETS tracks special education students' required activities and regulatory compliance, testing accommodations and functional test scores, disciplinary history, transportation requirements, pre-referral intervention strategies and free and reduced price lunch status. Also, through SETS, all billable events are identified. In Baltimore, the cost of the software was offset by substantial increases in Medicaid reimbursements. Specifically, in four years, Medicaid reimbursement improved from \$2.5 million a year to over \$25 million a year. In addition, Baltimore's special education data accuracy, as measured by Maryland state audits, increased from 50 percent to over 96 percent.

Garland ISD developed an automated Special Education management system as well as an internal auditing system. Specifically, Garland

developed a plan to identify if there were special education reporting problems, established a process to identify where problems existed, developed a system to ensure correct data entry, established an audit process to check the accuracy of the data, and initiated periodic checks to ensure that the data remained accurate. Garland ISD audits all special education data one day a year in late September and validates special education counts at the end of each six weeks. During the annual audit, special education staff members validate campus lists of special education students, check student information for accuracy, and update the special education computer management system. Garland has conducted annual audits for six years, and the error rate has been minimal during the last four of the six years. During the first annual audit, Garland ISD identified over 400 students who had not been accounted for in their special education data. The staff member responsible for developing the system indicated that the financial impact of identifying the additional students was substantial.

Recommendation 24:

Automate Special Education data entry, reporting and Medicaid billing.

The new system should include automated data entry, customized reports, and auditing of special education compliance requirements and Medicaid billing or reimbursement.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The executive director of Special Services, director of Special Education, and director of Technology determine what should be included in the automated special education management system and send out a Request for Proposal.	June 2001
2.	The executive director of Special Services identifies potential vendors and arranges for on-site demonstrations by vendors who meet the bidding requirements.	September 2001
3.	The executive director of Special Services, the director of Special Education, and the director of Technology select the special education management software that most closely matches the district's needs.	January 2002
4.	The executive director of Special Services and the director of Special Education collaborate with the director of Technology to implement the system.	June 2002
5.	The executive director of Special Services collaborates with the director of Technology to provide training to staff on the use of	August 2002

	the special education management software.	
6.	The executive director of Special Services and director of Special Education monitor and evaluate the effectiveness of the new special education management system and direct any necessary modifications.	January 2003

FISCAL IMPACT

The district should choose a vendor who will guarantee that the district's special education management system will pay for itself in three years due to increased Medicaid reimbursement. By the fourth year of implementation, after the cost of the maintenance contract, the district should experience a noticeable increase in Medicaid reimbursements. This recommendation could be implemented using existing resources.

Chapter 2

EDUCATIONAL SERVICE DELIVERY

G. Bilingual Education Program

A limited English proficient (LEP) student is defined as one whose primary language is other than English and whose English language skills are such that the student has difficulty performing ordinary class work in English. Subchapter B of Chapter 29 of the Texas Education Code sets forth state law on bilingual education. Each school district with 20 or more students of limited English proficiency in the same grade must offer bilingual education. This requirement means the district must offer dual language instruction in kindergarten through the elementary grades; instruction in English as a Second Language (ESL) or other transitional language instruction approved by TEA in post-elementary grades through the eighth grade; and instruction in ESL in grades 9 through 12.

TEC, Section 29.055 requires dual-language instruction to be a full-time program, with basic academic skills instruction in the primary language of the student and intensive instruction in English-language skills. The program should be designed to incorporate the cultural aspects of students' backgrounds. Bilingual education classes must be located within regular education campuses, not in separate facilities.

The goal of FWISD's bilingual education program is the same as the statewide goal established by the 1981 Texas Legislature: "Bilingual education or special language programs as defined by this Act shall be taught in the public schools only for the purpose of assisting the learning ability of limited English proficiency students and to enhance the English language."

The Texas Administrative Code, Chapter 89, Subchapter BB are the commissioner's rules that establish provisions to ensure equal educational opportunity for students of limited English proficiency as required by state law, TEC, Sections 29.051-29.064. According to the commissioner's rules, each district shall identify limited English proficient students based on criteria established by the State Board of Education; provide bilingual education and ESL programs as integral parts of the regular education program as described in TEC, Section, 29.053; seek certified personnel to ensure that limited English proficient students are afforded full opportunity to master the essential skills and knowledge required by the state; and assess achievement for essential skills and knowledge in accordance with state law, TEC, Chapter 39 to ensure accountability for limited English proficient students and the schools that serve them.

According to 1999-2000 AEIS data, FWISD had 19,678 identified LEP students (25 percent of the district's total enrollment). This percentage of identified LEP students was almost twice as high as the state percentage (13.9 percent of total population). **Exhibit 2-46** shows that of these identified LEP students, 18,659 were enrolled in FWISD's bilingual/ESL program (not all identified LEP students are served in a bilingual/ESL program; for example, parents have the right to refuse to allow their child to be enrolled in these programs). This figure represents 23.7 percent of the district's total student enrollment.

Among FWISD and its peer districts, bilingual/ESL expenditures per student ranged from \$306 to \$2,101. FWISD's per student expenditure was \$761, the second lowest among its peers and well below the state average of \$1,040. FWISD's per pupil expenditures for bilingual/ESL programs represent 5.9 percent of the district's overall budget. This percentage was the second lowest among the peer districts, but higher than the state average (3.9 percent).

Exhibit 2-46
Bilingual/ESL Per Student Expenditure for
FWISD and Peer Districts, 1999-2000

District	Students Enrolled in Bil/ESL	Percent of Total Enrollment	Budgeted Expenditures	Percent of Budgeted Expenditure	Per Student Expenditure
Austin	11,825	15.2%	\$22,078,145	8.5%	\$1,867
Dallas	50,493	31.5%	\$15,429,549	2.9%	\$306
El Paso	14,550	23.4%	\$18,211,392	9.6%	\$1,252
Fort Worth	18,659	23.7%	\$14,194,716	5.9%	\$761
Houston	49,869	23.8%	\$104,774,317	15.0%	\$2,101
State	498,222	12.5%	\$517,973,651	3.9%	\$1,040

Source: 1999-2000 TEA AEIS Reports.

FINDING

FWISD has developed a comprehensive bilingual/ESL program that addresses LEP students' varied needs. The program was recognized in a review by the McKenzie Group (September 2000) as a national trend-setter. Students' language development is monitored through explicitly

defined procedures and benchmarks. Student performance outcomes show that there were increases in the percentage of LEP students passing TAAS at all grade levels between 1996 and 2000.

FWISD's associate superintendent for Instruction-Area II is responsible for delivering services to LEP students. The director of Bilingual/ESL Education administers the program. The director oversees four staff persons responsible for: elementary ESL, secondary ESL, bilingual/ESL and bilingual/ESL migrant program. The superintendent led a restructuring initiative in 1997-98, as described below, that established a new vision for bilingual/ESL education in the district.

The elementary bilingual/ESL program for grades PreK-3 includes two components. The *Full Bilingual Program*, grades PreK-3, is a program for Spanish-dominant students (students whose primary language is Spanish). The program was implemented in 22 elementary schools by 231 bilingual teachers serving 4,619 students. The Modified Bilingual Program, for grades PreK-3, is a program for English-dominant Spanish-speaking students (students whose primary language is English but are also fluent in Spanish) in the same 22 elementary schools, with 52 teachers serving 980 students.

As described in the DEIP for 2000-01, the goal of the district's dual language program is for LEP students entering kindergarten to transition into English instruction by the end of grade 3 and to reach an advanced level of English proficiency within four years, as assessed by the Reading Proficiency Test in English (RPTE).

The ESL Program for grades PreK-12 students includes four components. The Language Center Program centers serve recent-arrival immigrant students in grades 3 through 12. These centers are located in 15 elementary schools, with 641 students and 33 teachers, and 15 secondary schools, with 795 students and 63 teachers. Transportation is provided from non-center schools. ESL-Only and Transition ESL Programs serve LEP students in grades PreK through 12 who are not served in other programs. These students are usually classified as advanced level ESL.

The ESL program includes 7,878 elementary students taught by 911 teachers, and 5,106 secondary students instructed by 203 teachers. The International Newcomer Academy for students in grades 6 through 12 is a one-semester to one-year program designed to orient new beginning-level immigrant students to U.S. schools. In the newcomer academy, 28 teachers instruct 605 students.

The Newcomer Career Academy, for grades 9 through 12, is a special four-year program for high school undereducated and overage immigrant

students that offers career-focused ESL, basic academic content area subjects and work experiences, with high school graduation/GED as the goal. There are 157 students and 6 teachers in this program.

Limited English proficient students entering an ESL program at kindergarten or bilingual/ESL in later years are expected to reach English proficiency within four years, as assessed through the RPTE, and non-LEP status within five years, as assessed through the English TAAS.

Exhibit 2-47 shows that for 1998 through 2000, the percentage of LEP students tested on the English TAAS increased in grades 3 and 4, decreased in grade 5 and remained relatively stable for grades 6, 7, 8 and 10. In 2000, 84 percent of grade 3 LEP students were tested with either the English or Spanish TAAS. As a result of the 1998-99 revision of the district's bilingual/ESL program, LEP students entering kindergarten now transition into English instruction by the end of grade 3, so grades 4 and 5 students do not take the Spanish TAAS.

Exhibit 2-47
Number and Percent of Limited English Proficient (LEP) Students
Tested on English and Spanish TAAS
1998-2000

Grade	1998		1999		2000	
	Number	Percent	Number	Percent	Number	Percent
English TAAS						
3	855	46.0%	1,180	59.0%	1,421	62.0%
4	1,153	68.0%	1,213	66.0%	1,513	79.0%
5	931	73.0%	735	63.0%	723	63.0%
6	902	69.0%	976	72.0%	858	66.0%
7	799	69.0%	902	68.0%	937	70.0%
8	622	66.0%	799	71.0%	897	70.0%
10	499	75.0%	576	76.0%	588	74.0%
Spanish TAAS						
3	718	38.0%	277	14.0%	491	22.0%
4	222	13.0%	-	-	-	-
5	72	6.0%	-	-	-	-

Source: Bilingual/ESL Education 1999-2000, FWISD Department of Research & Evaluation (Draft).

In 1999-2000, the FWISD guidelines for assessment of LEP students were simplified and communicated to all Language Proficiency Assessment Committee (LPAC) chairs. All LEP students were assessed with either the English or Spanish TAAS unless deemed eligible for exemption by an LPAC. FWISD's LEP exemption rates are compared with the peer districts in **Exhibit 2-48**. FWISD's LEP exemption rate decreased slightly from 1999 to 2000, but it is still somewhat higher than the average for the state and three of the peer districts for the last two school years.

Exhibit 2-48
Limited English Proficient (LEP) Exemption Rates
FWISD vs. Peer Districts
1998-2000

District	LEP Exemption Rate 1999	LEP Exemption Rate 2000
Austin	1.3%	2.0%
El Paso	2.3%	2.4%
Houston	1.6%	1.8%
Dallas	9.0%	3.9%
Fort Worth	3.6%	3.0%
State	2.2%	1.3%

Source: 1999-2000 TEA AEIS Reports. TAAS participation Grades 3-8 and 10.

Exhibit 2-49 compares LEP students' TAAS performance for the five-year period from 1996 through 2000. Across the years, there were significant increases in the percentages of LEP students passing the English TAAS at all grade levels in reading and mathematics. LEP students' reading performance in grades 3 and 4, however, was substantially better than students in the upper grade levels.

Exhibit 2-49
Comparison of All Limited English Proficient (LEP) Students:
Percent Passing English TAAS 1996 through 2000

Grade	Reading						Math					
	96	97	98	99	00	Diff*	96	97	98	99	00	Diff*
3	62.0%	60.0%	71.0%	82.0%	82.0%	20.0%	58.0%	67.0%	66.0%	76.0%	78.0%	20.0%
4	45.0%	60.0%	67.0%	73.0%	81.0%	36.0%	45.0%	66.0%	69.0%	76.0%	78.0%	33.0%
5	38.0%	49.0%	55.0%	51.0%	56.0%	18.0%	43.0%	57.0%	65.0%	72.0%	74.0%	31.0%
6	22.0%	44.0%	45.0%	57.0%	52.0%	30.0%	32.0%	50.0%	54.0%	67.0%	63.0%	3.0%
7	33.0%	39.0%	48.0%	51.0%	45.0%	12.0%	27.0%	40.0%	48.0%	54.0%	71.0%	44.0%
8	21.0%	42.0%	48.0%	63.0%	67.0%	46.0%	22.0%	37.0%	50.0%	62.0%	75.0%	53.0%
10	24.0%	38.0%	41.0%	48.0%	46.0%	22.0%	26.0%	29.0%	46.0%	52.0%	56.0%	30.0%

Source: *Bilingual/ESL Education 1999-2000, FWISD Department of Research & Evaluation (Draft).*

**Differences were calculated by subtracting the percent meeting minimum expectations for 2000 minus the percent meeting minimum expectations for 1996.*

Exhibit 2-50 shows the percentage of grade 3 students passing the Spanish TAAS for 1998 through 2000. The percentage of students passing the Spanish TAAS increased during this period. There was a significant increase in the percentage of students passing Spanish TAAS reading and all tests taken in 2000. For the past year, FWISD grade 3 students' Spanish TAAS passing rates were higher than the state average, and substantially higher than three of the four peer districts. FWISD had the highest percentage of third grade students passing all tests taken on the Spanish TAAS.

Exhibit 2-50
Percent of Grade 3 Students Passing Spanish TAAS
FWISD and Peer Districts, 1998 through 2000

District	Reading			Mathematics			All Tests Taken		
	1998	1999	2000	1998	1999	2000	1998	1999	2000
Austin	61.0%	64.0%	66.0%	59.0%	62.0%	63.0%	48.0%	53.0%	55.0%
Dallas	50.0%	58.0%	57.0%	45.0%	55.0%	49.0%	35.0%	46.0%	41.0%
El Paso	62.0%	71.0%	73.0%	65.0%	71.0%	73.0%	52.0%	61.0%	63.0%

Fort Worth	68.0%	68.0%	82.0%	65.0%	78.0%	77.0%	56.0%	63.0%	72.0%
Houston	74.0%	77.0%	82.0%	73.0%	75.0%	79.0%	64.0%	66.0%	71.0%
State	65.0%	74.0%	76.0%	65.0%	75.0%	75.0%	54.0%	65.0%	66.0%

Source: TEA 1999-2000 AEIS Reports.

Comments from the TSPR review team's elementary principal focus group indicated that principals find the campus-based Language Centers to be effective. They appreciated the English immersion, the instructional materials and the teacher training. Overall, interview and focus-group comments related to the programs for limited English proficient students from teachers, principals and staff suggested that despite changing district demographics and many challenges, the superintendent's 1998-99 revisions of the bilingual/ESL program have the district moving in the right direction. The 1998-99 review of the program showed that the district had an inadequate number of bilingual teachers, so bilingual education was limited to prekindergarten to grade 3 students. Almost all bilingual teachers were assigned to the lower grades to enhance language and reading development in the early years. In addition to teacher reassignments, progressive time allocations for Spanish and English instruction strengthened the bilingual education program. Beyond grade 3, the ESL program serves students of limited English proficiency. All students who speak languages other than Spanish receive modified instruction through the ESL program.

COMMENDATION

FWISD's Bilingual/ESL program is a comprehensive program that addresses LEP students' varied needs.

FINDING

FWISD's Student Placement Center facilitates the identification, assessment and classification of limited English proficient students, which reduces the need for teachers at the individual campuses to conduct time-consuming, one-on-one student assessments.

Texas Education Code, Section 29.056 requires the standardization of criteria for identifying, assessing and classifying limited English proficient students. Furthermore, the student's parent or guardian must approve a student's entry into the program, exit from the program or placement in the program. At FWISD's Student Placement Center (SPC), trained personnel facilitate the registration and assessment of limited English proficient students.

The Student Placement Center is a special registration/assessment office serving students whose first languages are other than English. According to the director of Bilingual Education, the center has reduced the testing load for individual campuses. Center staff includes 2.5 FTEs who administer assessments in Spanish and English to measure oral language, writing and reading skills. In addition to its assessment role, the center serves as a first point of contact with parents. Parents receive information about FWISD schools, an overview of their bilingual/ESL options, as well as information about social programs and health/immunization services.

Comments from a secondary principals' TSPR focus group suggested that the input process for non-native language speakers was effective, and that students were appropriately placed.

COMMENDATION The Student Placement Center provides an efficient and systematic way to identify and place students who are of limited English proficiency.

FINDING

FWISD is underreporting the number of bilingual/ESL teachers in PEIMS reports. According to AEIS reports, FWISD had 274.6 bilingual/ESL teachers (**Exhibit 2-51**). In contrast, El Paso ISD had close to the same student enrollment in bilingual/ESL education, but the district had more than twice that number of bilingual/ESL teachers (807). Moreover, FWISD had the lowest percentage of teachers in their bilingual/ESL program (6 percent). This low percentage is inconsistent with the peer districts that reported between 15 and 21 percent of their teachers in the bilingual/ESL program.

A program description provided by the FWISD Bilingual/ESL Department showed that the district employs 273 bilingual teachers and 1,244 ESL teachers, making a total of 1,517 bilingual/ESL teachers.

FWISD has filed a Request for Exception to Bilingual Education Services for the 2000-01 school year with the Texas Education Agency. A Request for Exception may be requested by districts who are unable to provide a bilingual education program as described in commissioner's rule, Texas Administrative Code (TAC) Section 89.1205. This Request for Exception must describe the alternative program that will be offered by the district.

FWISD data showed 239 teachers with bilingual certification currently teaching bilingual education, including 61 teachers on special permit (Alternative Certification Program, exchange teachers from Spain and Bilingual permit). No staffing information was included in the district's

annual Bilingual/ESL evaluation reports, as required by commissioner's rule (TAC Section 89.1265).

Exhibit 2-51
Limited English Proficient Students and
Bilingual/ESL Program Enrollment for
FWISD Versus Peer Districts
1999-2000

District	Number of LEP Students	Percent of Enrollment	Number of Students Enrolled in Bil/ESL Education	Percent of LEP Students Served in Bil/ESL	Number of Bil/ESL Teachers	Percent of Teachers in Bil/ESL Program
Austin	13,053	16.8%	11,825	90.6%	756.6	15.0%
Dallas	52,614	32.8%	50,493	96.0%	1,872.0	18.8%
El Paso	20,112	32.3%	14,550	72.3%	806.6	21.3%
Fort Worth	19,678	25.0%	18,659	94.8%	274.6	6.0%
Houston	55,472	26.5%	49,869	89.9%	2,172.9	18.7%
State	555,334	13.9%	498,222	89.5%	18,734.7	7.0%

Source: TEA 1999-2000 AEIS Reports.

Recommendation 25:

Modify the district's process for PEIMS reporting of bilingual/ESL staff and include staffing and certification information in the district's annual program evaluation report.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Research and Evaluation, the district PEIMS coordinator and the director of Bilingual/ESL Education review the district's procedures for identifying bilingual/ESL teachers for PEIMS reporting.	June 2001
2.	The director of Bilingual/ESL Education and the district PEIMS coordinator define procedures for reporting bilingual/ESL staff.	June 2001
3.	The PEIMS coordinator provides information and training to principals and data clerks on data-entry procedures.	July-August

		2001
4.	The director of Research and Evaluation directs the Bilingual/ESL program evaluator to include staffing data in the 2001-02 evaluation report.	August 2001

FISCAL IMPACT

This recommendation could be implemented using existing resources.

Chapter 2

EDUCATIONAL SERVICE DELIVERY

H. Career and Technology Education Program

Section 29.181 of the Texas Education Code requires school districts to provide a curriculum that affords each student the opportunity to "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."

State Board of Education rules [Texas Administrative Code, Section 74.3(b)(2)(I)] require school districts to offer school-to-career education courses selected from at least three of eight career and technology educational areas: agricultural science and technology, business education, career orientation, health science technology, home economics, industrial technology, marketing, and trade and industrial. Career and Technology Education (CATE) gives students an opportunity to make informed occupational choices and develop marketable skills.

In FWISD, three central office administrators are associated with career and technology education. All work under the direction of the associate superintendent of Instruction-Area I. Administrative personnel include the director of Career and Technology Education and Adult Education, the program director of Adult Education and the program director of Graduate Placement.

FINDING

FWISD's Career and Technology Education program offers a wide range of courses and programs that enable students to complete high school with technical skills for employment as well as qualifications to enter postsecondary education. In FWISD, the guidance and counseling program addresses both academic and career planning. Career awareness begins in kindergarten and continues through sixth grade. Counselors use locally developed materials to identify students' interests and skills, relate their interests to career clusters and teach them how a specific course of study can lead to a career goal.

In middle school, a district handbook, *Explore Your Future*, allows seventh and eighth graders to explore interests and choices. Ninth and tenth graders explore career plans through *Discover Your Future*. Eleventh and twelfth graders complete an individual academic and career plan, *Countdown to Your Future*. All students enrolled in CATE programs

receive guidance in educational and career planning and have developed an educational plan based on interests and aptitude.

As shown in **Exhibit 2-52**, FWISD offers eight vocational program areas. Courses are offered at 20 middle schools (grades 7 and 8) and 15 high schools (grades 9 to 12). Because of the diversity of the FWISD career and technology education program, all classes cannot be offered at every school. Therefore, a student has an opportunity to enroll in a vocational/technical education course at another school when the desired course is not offered at their home school. A student may enroll on a full-time basis or on a multi-school basis in another school. The decision to attend a school other than the home campus is based on interest and aptitude and is reached after a conference with a vocational counselor.

FWISD offers a Tech-Prep program, which is a coordinated sequence of academic and technical courses leading to a specific career pathway. Some career and technology education foundation courses may begin in the ninth grade. These programs are not available on every school campus, so counselors inform students about Tech Prep offerings.

Exhibit 2-52
FWISD Career and Technology Courses

Program Area	Course Title	Course Title
Agriculture Science & Technology	Energy & Environmental Technology	Horticulture; Horticulture Plant Production
	Floral Design & Interior Landscape	Landscape Design, Construction, & Maint.
	Fruit, Nut, & Vegetable Production	Agricultural Cooperative Training
Business Education	Introduction to Business	Office Assistants
	Keyboarding/Word Processing	Student Assistant Services
	Record keeping	Business Computer Applications
	Personal Finance	Honors Business Computer Applications
	Accounting/Honors Accounting	Business Computer Programming
	Honors Advanced Accounting	Business Information Processing

	Business Law	Microcomputer Applications
	Business Management & Ownership	Office Support Systems
	Shorthand/Advanced Shorthand	Office Administration/Specialization
	Business Communication	Office Administration/Cooperative
	Career Investigation	Computer Science
Health Science Technology	Health Care Science	Health Science Technology/Coop
	Health Occupations Technology/Lab	
Industrial Technology Education	Technology Systems	Computer Applications
	Communication Systems	Construction Systems
	Manufacturing Graphics	Production Systems
	Construction Graphics	Manufacturing Systems
	Communication Graphics	Research and Development
	Energy Systems	Principles of Technology
Marketing Education	Principles of Marketing	Marketing Education Laboratory
	Retail Merchandising	Entrepreneurship
	Marketing Education/Cooperative	
Trade and Industrial Education	Advertising Design	Electrical Trades
	Air Conditioning/Refrigeration	Graphic Arts
	Automotive Collision Repair/Refinish	Law Enforcement Training
	Automotive Technician	Machine Shop
	Bricklaying/Stone Masonry	Media Technology
	Commercial Photography	Upholstery/Furniture Repair
	Computer Maintenance Technician	Vocational Electronics

	Construction Carpentry	Welding
	Cosmetology	Industrial Cooperative Training
	Drafting	
Home Economics Education	Comprehensive Home Economics	Food Science and Nutrition
	Individual and Family Life	Housing, Design and Furnishings
	Home Economics for Parenting Teens	Interior Design
	Advanced Child Development	Apparel
	Management	Textile and Apparel Design
	Consumer and Family Economics	Home Economics Career Cluster
	Family and Individual Health	
Home Economics Pre-Employment Laboratory	Child Care, Guidance, Management	Intergenerational Professions
	Food Production, Management	Early Childhood Professions
	Hospitality Services	Supervised Career Strategies

Source: FWISD Career and Technology Education, Graduate Placement Center document.

FWISD's Trimble Technical High School is a comprehensive high school and career development center. Admission is by application and based upon the student's demonstrated commitment to learning, a history of good attendance and good citizenship. Students may pursue an Advanced Applied Learning Program that combines traditional instruction with applied learning methodology in core academic classes. Coursework focuses on school and community service through project-based learning. Students may earn college credit through Advanced Placement and Tech-Prep courses. Students are offered a choice of career pathways. Working closely with counselors, students select courses that will broaden their knowledge and skills in specific career areas.

Exhibit 2-53 shows the percentage of students enrolled in CATE and budgeted expenditures for career and technology programs at FWISD and its peer districts. FWISD enrolled 18.4 percent of its students in CATE courses, a figure comparable to the peer districts and the state; however, its per student expenditure (\$571) is substantially below the state (\$725) and the four peer districts. However, FWISD's per student expenditure figure does not include numerous state and federal grants that currently support CATE programs. FWISD employs 188 career and technology teachers, about 4 percent of the district's teaching force.

**Exhibit 2-53
Program Information for Career and Technology Education
by Peer Districts and State for 1999-2000**

District	Student Enrollment		Budgeted CATE Expenditures		
	Number	Percent	Amount	Percent	Per Student
Fort Worth	14,488	18.4%	\$8,278,281	3.4%	\$571
Austin	11,250	14.5%	9,890,010	3.8%	\$879
Dallas	28,861	18.0%	21,677,932	4.1%	\$751
El Paso	10,764	17.3%	6,448,439	3.4%	\$599
Houston	35,459	16.9%	22,583,733	3.2%	\$637
State	741,806	18.6%	\$537,799,816	4.1%	\$725

Source: 1999-2000 TEA AEIS Reports.

Exhibit 2-54 shows the highest numbers of students were enrolled in business, home economics, technology/industrial technology, and the trade and industrial areas. Participation in other areas was limited either by student interest or the extent of course offerings.

**Exhibit 2-54
FWISD Student Enrollment in Career and Technology Education
by Program Areas for 1999-2000**

Program Area	Number of Students
Business	6,028
Home Economics	2,134
Technology/Industrial Technology	1,923

Trade and Industrial	799
Health Science Technology	279
Career Orientation	197
Marketing	150
Innovative	118
Agricultural Science and Technology	59
Magnet Courses	16

Source: FWISD Research and Evaluation report. Duplicated count-students may be enrolled in more than one program area.

COMMENDATION

FWISD offers a wide range of school-to-career programs that provide students many opportunities for work-based learning.

FINDING

FWISD's high school students can earn college credit that is likely to reduce the overall cost of higher education and the time needed after high school graduation to complete post-secondary education. Early college credits may be earned through two options: Credit in Escrow and Dual Credit.

Credit in Escrow is offered through Tech-Prep. The Tech-Prep program teams FWISD with Tarrant County Junior College to cooperatively improve the education of students preparing for the workplace. According to an articulation agreement between FWISD and the post-secondary institution, after high school graduation, if the student continues the program of study at a post-secondary institution, he or she can apply for and be awarded up to nine semester hours of college credit. Students selecting a Tech-Prep program, including technology, health, human services/child development and business complete a six-year sequence of courses that leads to an associate in applied science degree. The sequence includes integrated academic and career and technology courses taught to prepare students for entry-level employment and continuing education. Enrollment data for 1999-2000 showed that 379 students in grades 9 to 12 participated in Tech-Prep.

FWISD has an agreement with the Tarrant County College District for concurrent (dual) credit courses. In the dual credit option, a student earns

college credit and also satisfies high school diploma requirements. Tuition is free, but all relevant fees must be paid.

COMMENDATION

FWISD teams with Tarrant County Junior College to provide Tech-Prep, a coordinated sequence of academic and technical courses leading to a specific career pathway or continuing education, and provide dual credit courses with free tuition.

FINDING

There is inadequate evaluation data to determine the effectiveness of FWISD's CATE or Tech-Prep program. Career and Technology Education (Vocational Education) is listed as a supporting imperative in the District Educational Improvement Plan. Desired outcomes, however, focus on program implementation issues and fail to establish clearly defined student outcomes. FWISD's director of Research and Evaluation reported that there were no program evaluations for career and technology, and no efforts had been made to link student participation in CATE with TAAS outcomes. Furthermore, TSPR review team efforts to determine the demographic characteristics of CATE participants yielded little information. The program director provided counts for student participants at various schools, but there were no cumulative statistics or data disaggregation by ethnicity, income, limited English proficiency or disability.

Information reported in **Exhibit 2-55** shows FWISD students are primarily enrolled in career and technology course work rather than a planned, sequential career pathway. A limited number of students were enrolled in a coherent sequence of courses and an even smaller number were participants in the district's Tech-Prep program. Considering FWISD's low student attendance rate and high dropout rate, it is important to determine how the CATE program and Tech-Prep might best support students' career planning and goal-setting as well as districtwide dropout prevention efforts.

Exhibit 2-55
FWISD Student Enrollment in Career and Technology Program
by Grade Level for 1999-2000

Indicator	Grade 7	Grade 8	Grade 9	Grade 10	Grade 11	Grade 12	Total
Career and Technology	2,436	2,482	2,532	2,351	1,880	1,709	13,390

course							
Coherent sequence course	0	0	55	238	233	194	720
Tech Prep program	0	0	6	53	136	184	379

Source: FWISD Research and Evaluation report.

The Texas Business and Education Coalition report that there is a positive correlation between enrollment in CATE programs and improved student test scores, as well as the likelihood of students going on to college. El Paso ISD, which has developed many innovative, cutting-edge career and technology education programs, found the number of CATE students going on to college compared favorably with the college-bound numbers for the general population. In Killeen ISD, CATE students had better attendance and a lower dropout rate than the general population. The Austin ISD Office of Program Evaluation reports information for CATE students, including student demographic characteristics, TAAS performance, graduation rates, dropout rates, SAT/ACT scores and continuation in CATE programs.

Recommendation 26:

Analyze data and evaluate the Career and Technology Education programs to identify ways to maximize program effectiveness.

The district should track CATE student characteristics (demographic information, TAAS scores, SAT/ACT scores, transcript requests, college admissions, attendance and dropout rates) for comparison with students in the general population. These findings should be distributed to central office administrators, program administrators and coordinators, as well as individual school principals, counselors and teachers.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent directs the director of Career and Technology Education and the director of Research and Evaluation to convene a committee, including counselors, CATE coordinators, principals, teachers, business leaders and a data analyst to analyze data and develop a reporting plan for career and technology education.	June - July 2001
2.	The director of Research and Evaluation directs a program evaluator to track and periodically report data for CATE students by program area for the district, middle schools and high schools.	August 2001

3.	The committee reconvenes to review CATE data for the 2001-2002 school year, to make short-term and long-term recommendations, and to establish an action-plan for CATE for the 2002-2003 school year.	January 2002
4.	District and school improvement teams use data to develop goals and objectives for program areas identified as needing improvement.	February 2002

FISCAL IMPACT

This recommendation could be implemented using existing resources.

Chapter 2

EDUCATIONAL SERVICE DELIVERY

I. Health and Wellness Services

FWISD's School Health Services Department provides services designed to meet the mental, physical and emotional needs of students. The department consists of the director of Health Services, two nursing specialists, a lead senior nurse and two secretaries. The director of Health Services reports to the associate superintendent for Instructional Support and Auxiliary Services. Schools have Professional Registered Nurses with Bachelor or Master of Science Degrees in Nursing or a related field.

FINDING

The Health Services Department has developed a set of measurable school-level objectives for the 2000-01 school year. These objectives were sent to all principals and nurses during June 2000. The objectives include timelines for accomplishing specific tasks.

Health Services Measurable Objectives:

- To maintain an accurate and up-to-date health record for each child in the FWISD to be initiated for new pupils by October 1 of each year, and immediately upon a student's enrollment throughout the year.
- To review all students' immunization records by November 1 of each year to ensure that all children are completely immunized as rapidly as their individual immunization schedule allows.
- To enter all immunization dates for all new students and updates for enrolled students on the computer by November of each school year and throughout the school year.
- To complete vision screening on all pupils new to the FWISD within 120 days of their enrollment to comply with the Texas Special Senses Communications Disorders Act.
- To complete vision screening of pupils in grades K, 1, 3, 5, and 7 by February 28 of each school year to ensure adequate time for correction of defects. Screen referrals throughout the year.
- To complete audiometric screening of all pupils new to the FWISD within 120 days of their enrollment to comply with the Texas Special Senses Communications Disorders Act.
- To complete audiometric screening of pupils in grades K, 1, 3, 5, and 7 by February 28 of each school year to ensure adequate time for correction of defects. Screen referrals throughout the year.

- To complete spinal screening of students in grades 6 and 9 by March 28 of each school year, to ensure adequate time for correction of defects.
- To provide developmental assessment (height and weight) annually for all new elementary students, grades 3 and 5 by April 1 of each year and other pupils at the discretion of the nurse.
- To complete the Referral Data-Section IV Health Information form for all students who are referred for possible special education placement within seven days after receiving the referral form and to make appropriate referral recommendations as needed.
- To arrange for, at the nurse's discretion and when indicated, the physical assessment of students referred for special education placement within two weeks of the date referred to the nurse by the screening committee. All students will be re-evaluated every three years.
- To provide sanitation and safety inspection of the cafeteria and other food service rooms in each school to be completed by September 30, and repeated every two months throughout the school year.
- To prevent the spread of communicable or nuisance diseases among students by quickly arranging for the treatment or exclusion of students as the problem is identified.
- To schedule and participate in conferences with parents, teachers and other school and community personnel within 10 days of the identification of the problem or condition for which the conference is being held.
- To provide proper emergency care for all people injured or ill at school immediately upon notification of such injury or illness.
- To serve as health education resource to students and staff, scheduling classroom presentations within 2 weeks of request.
- To perform specialized health care procedures upon physician's request and written consent of parents.
- To provide in-service training on proper administration of medication, specialized health care procedures and first aid, to staff designated by principal at the beginning of each school year and as necessary throughout the school year.
- To report to the Texas Department of Protective and Regulatory Services, within 48 hours, all identified or suspected cases of child abuse and serve as a resource person, if necessary, to school personnel.
- To provide pregnancy-related services to eligible pregnant and parenting students and to complete the Individual Student Plan throughout the year.
- To complete the SHARS School Health Services Tickets for all eligible special education students.

- To complete the Medicaid Administrative Time Study Report and return to Deloitte and Touche as scheduled.
- To provide information for the superintendent's state reports on the immunization, vision, audiometric, and spinal screening status of students by May 1 of each year.
- To provide dental education to students in PK-2 grades by April 1 of each school year.
- To provide CPR to staff at the discretion of the school nurse when deemed appropriate.

The director of Health Services prepares a yearly report that shows the number of students and employees served. In addition to student screening and intervention health services, the district provides a wellness program for school staff including mammograms, blood pressure checks and flu vaccines. The director of Health Services noted that FWISD has a 99-percent compliance record for student immunizations. Every nurse has a computer to enter contacts made and services provided. The number of school nurse contacts is shown by service in **Exhibit 2-56**.

Exhibit 2-56
School Health Services Provided
1999-2000

Type of Service	Number of Contacts Made
Screening	
Blood Pressure	2,337
Hearing Test	46,006
Height & Weight	33,630
New Pupil Vision Test	12,005
Pediculosis (lice) Screening	48,551
Scabies Screening	1,067
Scoliosis	11,878
Vision Test	47,717
Dental Examination	
Nurse	6,041
Dentist	13,522
Illness and Injuries	

Accidents (Reportable)	1,905
First Aid - Minor Accidents	189,670
Illness	184,277
Students - Child Abuse	255
Students Receiving Medication	16,366
Special Health Care Procedure	
Blood Glucose Testing	6,184
Catheterizations	988
Catheterizations - Supervised	1,229
Gastrostomy - Tube Feeding	11,078
Nasal/Oral/Trachea/Suctioning	458
Nebulizer Breathing Treatment	2,368
Transporting Students by Cab	53
Services to Employees	
Blood Pressure	4,954
Conferences (Personal)	5,521
First Aid & Illness	2,910
Hearing Test	52
Vision Test	79

Source: FWISD Health Services Department Combined Report from September 1999 to June 2000.

COMMENDATION

FWISD's School Health and Wellness Services Department has measurable objectives and uses them to meet the health needs of students and employees.

FINDING

FWISD's four school-based health clinics were last evaluated during the 1997-98 school year. The school-based health clinics provide health services to economically disadvantaged (eligible for the federal free or reduced-price lunch program) students. The school-based health clinics

are located at Denver Avenue Elementary, S.S. Dillow Elementary, Glen Park Elementary and Eastern Hills Elementary. These clinics are operated through a partnership between FWISD and sponsoring agencies including the Fort Worth Public Health Department, JPS Health Network and All Saints Health Care System. Sponsors vary by clinic.

When health care services are provided, children are considered patients of the sponsoring organization. The clinics provide health services for many children and families who do not qualify for Medicaid or other health insurance. The school nurse and clinic staff collaborate to meet students' needs. School nurses refer students to the clinics when service is needed. Once the child has received services through the clinic, the child is referred back to the school nurse. Siblings of students may receive services from the centers without a referral. FWISD provides van transportation to get students to the clinics when available.

Data from a 1997-98 report showed that 4,200 visits to the district clinics were logged and that the top diagnoses were for simple infections such as ear infections, upper respiratory infections, conjunctivitis and pharyngitis. Well child visits and immunizations were no longer among the top five diagnoses, due to decreased staffing at sponsoring agencies, which resulted in less recruiting of students for the well-check exams. This report concluded that "the decreased availability of well child care and immunizations may negatively impact the health status of FWISD students and their siblings." Also, no cost data was collected that year.

Recommendation 27:

Evaluate the services provided, students served, collaboration between FWISD and sponsoring agencies as well as the costs of running school-based health clinics.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent requests a study of the school-based clinics from the Research and Evaluation Department.	August 2001
2.	The Research and Evaluation Department conducts the evaluation study.	July 2002
3.	The director of Health Services incorporates findings from the study.	August 2002

FISCAL IMPACT This recommendation could be implemented using existing resources.

Chapter 3

COMMUNITY INVOLVEMENT

This chapter discusses Fort Worth Independent School District's (FWISD's) relations with the community, business leaders and parents and its communication efforts in the following sections:

- A. Organization and Management
- B. Community and Business Involvement
- C. Parent Involvement
- D. Communications and Public Relations

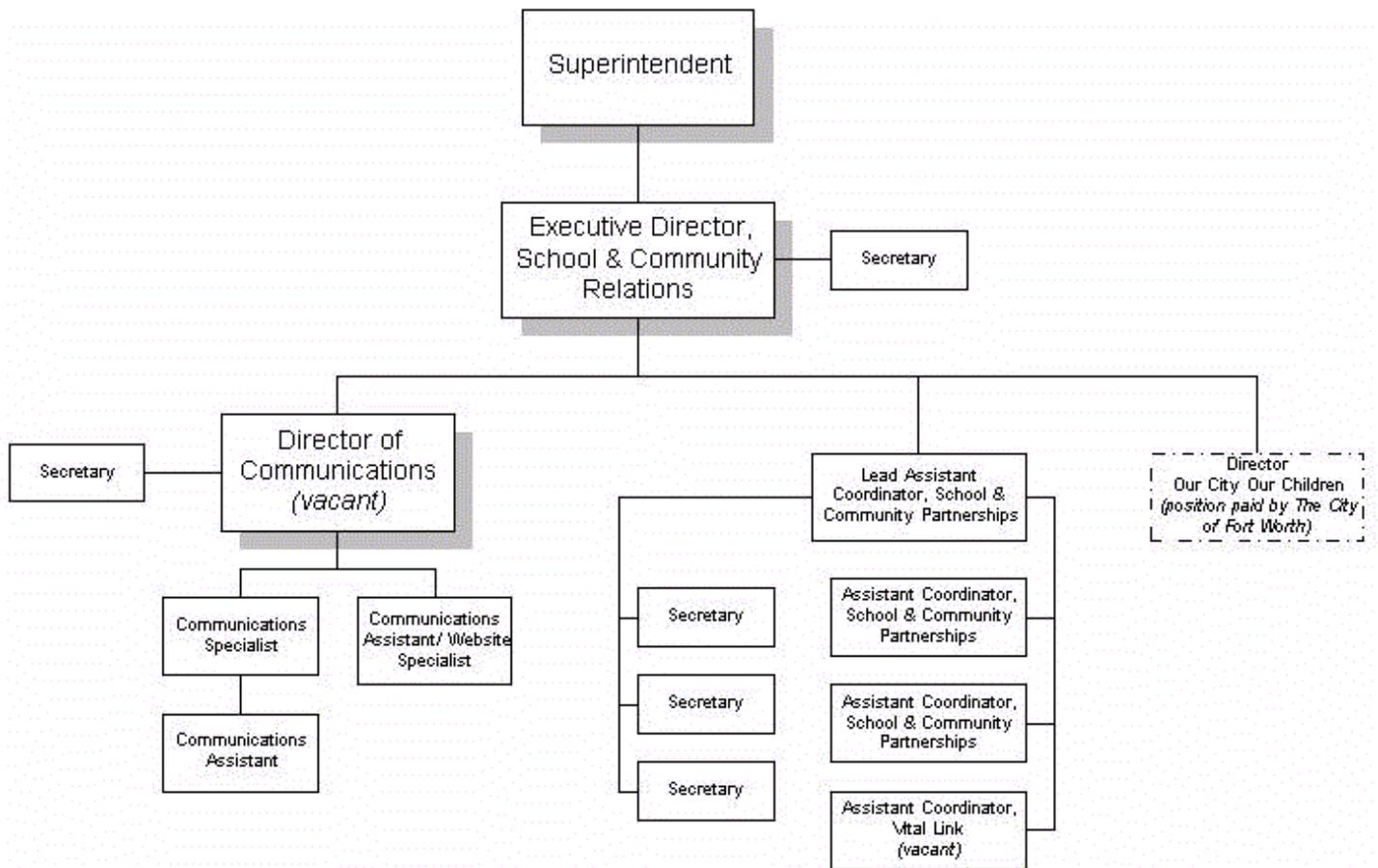
A school district can provide quality educational services when effective partnerships with a diverse range of stakeholders - parents, local business and civic leaders, taxpayers, public officials, community organizations and others with a stake in public education are established. School districts must ensure that programs that support community involvement become an important part of a quality education system.

BACKGROUND

The mission of FWISD's community involvement program is to develop effective partnerships with businesses, community organizations and non-profit agencies. These partnerships should support school goals, provide resources to schools to meet students' needs and connect families and individuals to educational resources available at schools. The district can accomplish its mission by providing information to parents, businesses and the community in order to enlist their support and strengthen communications and by developing meaningful programs that support involvement from all partners.

Exhibit 3-1 illustrates the organization structure of community involvement and communications for FWISD.

Exhibit 3-1 School and Community Relations Organization Structure



Source: FWISD School and Community Relations

Compared with districts of similar size, the department is conservatively staffed. The department has the appropriate functions assigned to it: volunteers and business partnerships, fundraising, communications, media production and publications. The department's organizational structure promotes well-coordinated efforts to achieve effective community involvement.

Chapter 3

COMMUNITY INVOLVEMENT

A. Organization and Management

FWISD's community involvement and communication function is contained within one department, the School and Community Relations department that includes a Communications office and a School and Community Partnerships office (SCP).

SCP is staffed by four professional staff and three secretaries, while the Communications office consists of a director (currently in the process of being filled), two professional staff, one full-time Web site specialist, and one secretary. The executive director of School and Community Relations reports directly to the superintendent.

FINDING

The School and Community Relations Department has targeted community involvement as a continuing and necessary program objective for the district's success. The district's commitment to establishing a successful program is evidenced by the inclusion of a School/Community/Parent Relations and Involvement imperative as one of twelve imperatives outlined in the 2000-01 District Educational Improvement Plan (DEIP). Imperative 11 of the plan outlines the following goals of the program:

"Parents and educators must be partners in building strong futures for our children. All district personnel will work to forge a strong bond and working relationship with individuals and organizations throughout the community, including six types of involvement: parenting; communicating; volunteering; learning at home; decision making; and collaborating with the community."

Exhibit 3-2 details the objectives, strategies and outcomes of Imperative 11 for accomplishing these goals. In addition, the plan identifies responsible staff, resources needed and implementation timelines.

Exhibit 3-2
FWISD Imperative 11
School/Community/Parent Relations and Involvement Plan

Objective	Strategies	Desired Outcomes
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Participation of parents and others from the community in district programs and activities designed to improve student performance will increase in 2000-01	Serve an increased number of students in Vital Link with an increased number of corporate participants	Increase Vital Link participation
	Ensure that all schools have an Adopt-a-School partner whose activities are based on the Campus Educational Improvement Plan (CEIP) and support student achievement	All schools matched with partner; increased involvement from business community
	Increase volunteer hours by parents	Increase parental involvement
	Conduct monthly meeting with the District Advisory Committee (DAC) to review and advise administration and the board on district strategies designed to improve student performance	Administration and board to receive recommendations for improving student performance
	Hold monthly community forums in collaboration with the PTA and superintendent	Increase involvement of parents and community
Communication strategies will be implemented to provide information to parents, staff and the community regarding district goals and achievements as well as opportunities to participate in district programs and initiatives	Send FWISD information page monthly to the <i>Fort Worth Star Telegram</i> and other community newspapers	Inform parents and community of district events, board actions, and opportunities for involvement
	Send monthly report to key communicators in the community, quarterly to FWISD staff and annually to supporters of the bond program; the annual report will be mailed to all FWISD parents, staff and key individuals from the community	Inform public of district progress

	Update the FWISD website weekly to ensure timely information; all departments and schools will be encouraged to have a presence on the web	Provide timely information and reach broader constituent base
Communication strategies will be implemented to increase recognition for teachers, staff and the business community for their efforts to help students achieve at high levels	Develop and implement a year-long Points of Pride public relations campaign to communicate success in the FWISD and invite staff and others to recognize employees, students and volunteers for their efforts	Increase community recognition of FWISD staff and students
	Provide increased recognition for teachers and students	Increase recognition for teachers and students
	Produce a public relations handbook for principals, and all principals will be trained in strategies to recognize teachers and staff	Principals implement suggestions to increase recognition for teachers and staff
	Train and utilize school communicators to recognize achievements of staff and students as well as the involvement of the business community in schools	Internal and external constituents are informed of the involvement of the business community and the achievement of students in the district
	Train adopters and Adopt-a-School coordinators to communicate with teachers about their efforts to assist in student achievement	Teachers and staff are informed about the involvement of the business community in FWISD schools
	N/A	Give SBDM teams the tools to be effective in enhancing student achievement
Provide training in site-based decision-making to new members and to teams requesting it	Focus training on emphasizing the importance of staying focused during Site Based Decisions	Agendas from each campus SBDM meeting will reflect the focus on goal-setting and

	Making (SBDM) meetings on goal-setting and campus planning designed to improve student achievement	campus planning designed to enhance student achievement
Identify and train groups of teacher leaders to provide site-based decision-making training to new members and to teams requesting this training	Provide training to teacher leaders to enhance their knowledge of the site-based decision-making process and to increase the number of persons qualified to deliver district-level training in SBDM	At least ten training sessions on SBDM will be provided at district level to ensure effective and successful SBDM teams
Provide an Early Literacy Program (ELP) to area childcare providers that focuses on provision of early literacy and numeracy experiences for young adults	Provide monthly on-site sessions for participating childcare centers based on Parents as Teachers <i>Emerging Literacy and Everyday Math</i> curricula	Increase participant knowledge in literacy and numeration
	Administer pre-assessments to participants to determine beginning levels of knowledge about literacy and numeracy	Plan future workshops based on results of pre-assessment
	Conduct program evaluation based on the results of assessments and participant input	Evaluate program and make revisions if necessary
Training in strategies to promote literacy and numeracy acquisition in young children will be provided to district families by "Parents as Teachers" educators	Workshops will be planned and developed for five Parent Night sessions that incorporate an overview of Language Arts components as developed in Region XI's <i>Partners in Literacy</i>	Parents will become knowledgeable about literacy and numeration skills development in young children
	Administer pre-assessments to participants at each workshop to determine beginning levels of knowledge about literacy/numeracy	Determine future training needs

	Provide participating families a book for each night they attend	Parents will start a home library
	Provide families an opportunity to make games at parent nights for home use to reinforce literacy and numeracy acquisition	Parents will work at home to assist young children in acquiring literacy and skills
	Administer post-assessments to participants at each workshop to determine final levels of knowledge about literacy/numeracy	Evaluate program efficacy and make revisions if necessary
Collaborate with city to execute inter-local agreement to provide after-school programs and services to district students	Use family assessments and input to evaluate program	Evaluate program and guide program revisions if necessary
	Identify schools with high numbers or percentage of households in poverty, or high crime attendance areas	Provide safe, productive after-school activities for "latchkey" students
	Identify providers of academic enrichment, recreation, fine arts, and sports programming	Provide needed services
	Request proposals for services from school-based collaboration of school personnel, parent, student and community representatives	Meet needs identified by stakeholders
Provide one Parent Liaison position at each Title I school	Select a parent liaison who will provide a positive connection between the campus and the community	Increased parent participation
Provide monthly support meetings for Parent Liaisons	Provide workshops to keep parents up-to-date on requirements and/or changes, as well as additional training	Completed Parent Liaison notebook

	Provide opportunities for the parent liaisons to share ideas and successful strategies on getting parents more involved	Completed Parent Liaison notebook
Provide and coordinate parent involvement opportunities on a regular basis at each school	Schedule parent meetings and workshops using a variety of locations and times to accommodate the needs of the parents at the school	Increased parent involvement
Provide a written copy of the parent-school compact to each family and the Federal Programs Office	Provide workshops for principals on the development of the parent-school compact	Increased and improved parent-school communication and academic achievement for students
	Provide campus workshops for staff on the positive effects and uses of the parent-school compact	Increased and improved parent-school communication and academic achievement for students
Provide frequent reports to parents on their child's progress	Provide reports to parents in their home language	Increased parental involvement and improved academic achievement
Provide parent-teacher conferences in elementary schools, annually, to discuss the compact and how it relates to the child's achievement	Provide workshop for staff on how to conduct positive parent-teacher conferences	Increased parental involvement and improved academic achievement
	Schedule conferences to accommodate parents' schedules	Increased parental involvement and improved academic achievement
Establish an open door policy that encourages parental involvement	Provide parents access to staff, opportunities to volunteer and participate in their child's class and observation of classroom activities	Increased parental involvement and improved academic achievement

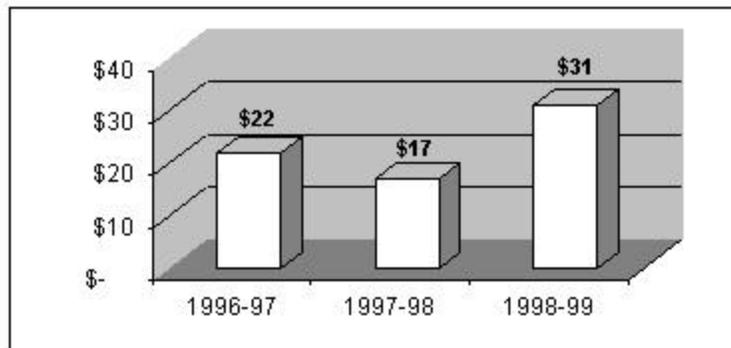
Source: FWISD District Educational Improvement Plan 2000-01.

From these program goals and objectives established under Imperative 11 of the District Educational Improvement Plan, FWISD's School and Community Relations department develops an annual planning process to facilitate program success. This process includes:

- Programs that will be instituted or continued;
- Activities to be performed;
- Stakeholders that will be affected by each program or activity;
- Resources required to implement programs and activities, including staff members responsible; and
- Communication outlets required to publicize programs and activities.

These program goals along with a formalized planning process has resulted in an increase in per student community involvement program expenditures. Expenditures per student were higher last year than the two years prior. **Exhibit 3-3** details expenditures per student in 1996-97, 1997-98 and 1998-99.

Exhibit 3-3
FWISD Expenditures Per Student for Community Involvement
1996-97, 1997-98, 1998-99



Source: Texas Education Agency Public Education Information Management System (PEIMS).

FWISD allocates more resources per student to its community involvement program than all but one of its peer districts. FWISD's actual per student expenditures for community involvement functions in 1998-1999 were \$30.60 (**Exhibit 3-4**), based on expenditures reported to the state's Public Education Information Management System (PEIMS). These expenditures include recreation, civic activities, and services for nonpublic school students. The actual expenditures of FWISD's peer districts ranged

from a low of \$4.13 in the El Paso ISD to a high of \$39.38 in the Dallas ISD.

Exhibit 3-4
Community Involvement Budgeted Expenditures
FWISD and Peer Districts
1998-1999

District	Community Involvement Expenditures per Student
El Paso	\$4.13
Austin	\$8.10
Houston	\$12.62
Fort Worth	\$30.60
Dallas	\$39.38

Source: Texas Education Agency Public Education Information Management System (PEIMS).

FWISD's higher student expenditures are a result of the district's commitment to community involvement outlined in the District Educational Improvement Plan (DEIP) which provides the School and Community Relations Department with specific and measurable objectives and strategies.

COMMENDATION

The School and Community Relations Department has established detailed and measurable goals, objectives and strategies through its District Educational Improvement Plan that has resulted in successful community involvement programs.

FINDING

The School and Community Relations Department conducts best practices reviews during its periodic reviews of existing programs and prior to implementing new programs or initiatives. Following are some examples:

- After some reluctance because of its volunteerist nature, the School and Community Partnership (SCP) office recently surveyed its community partners in the Adopt-a-School program regarding their

financial or in-kind contributions to FWISD schools. As part of its planning process, the SCP contacted districts around the state to obtain survey instruments and selected the most useful information from them for its partner survey. From this survey, FWISD learned that over \$250,000 was donated through the Adopt-A-School program in in-kind gifts alone during the 1998-99 school year.

- In order to adequately plan for a bond package campaign called for by the FWISD board, department staff surveyed neighboring and state school districts for materials and statistics pertaining to any recent bond campaigns in their districts. The School and Community Relations Department recently learned of a unique program in the Houston ISD that invites business partners to substitute teach, while teachers are attending professional development or special initiative workshops. Department staff contacted the program coordinator to obtain information regarding funding, community support, program evaluation, success factors and benchmarks. The department is currently reviewing program feasibility. In response to employee group requests for increased teacher and staff recognition, SCP contacted districts around the state and held focus groups with teachers to investigate meaningful ways to recognize all staff for their contributions. These discussions ultimately led to the district awarding "Becoming the Best" lapel pins to Exemplary and Recognized school staff at the 2000 Convocation.
- Prior to developing its web site, FWISD's Communications Department reviewed other district websites for ideas on the most useful content for all stakeholder groups, user-friendly layout and navigation and other ways to best utilize the new media.
- The Communications Department is developing a crisis communications plan. Presently, department staff is calling other districts around the state for sample plans.

This description of formal and informal best practice reviews conducted by SCF staff has resulted in cost savings for the district.

COMMENDATION

FWISD conducts best practices reviews as part of its planning process prior to implementing new programs, and as benchmarks for evaluating existing ones.

FINDING

SCP administrative staff are classified at different grade levels despite similar responsibilities leading to a high turnover rate at the lower graded position. The lower position is classified as pay grade 4 while the other

two positions are classified as a pay grade 5. Average district costs for a clerical pay grade 4 position is \$30,672, based on a salary of \$26,350 and benefits of \$4,324. The average cost for a clerical pay grade 5 position is \$32,833, based on a salary of \$28,325 and benefits of \$4,508. **Exhibit 3-5** compares the major duties of the two clerical positions.

Exhibit 3-5
SCP Secretarial Duties Comparison
Pay Grades 4 and 5

Pay Grade 4 Duties	Pay Grade 5 Duties
<p>Vital Link Student Internship Program:</p> <ul style="list-style-type: none"> • Manage application process • Make student placements • Develop correspondence for company and student recruitment • Develop correspondence with companies, parents and students • Maintain databases • Maintain supplies • Maintain files • Correspond with coordinator • Input student transportation requests • Prepare and send welcome letters, thank you letters, and reminder cards to companies • Keep track of all information for approximately 1180 students • Prepare and mail out teacher and supervisor packets • Create certificates • Handle trouble shooting calls • Sort through student journals for PR quotes <p>Non Program-Specific Duties:</p> <ul style="list-style-type: none"> • Open office • Answer phones 	<p>Teaching Chairs Program:</p> <ul style="list-style-type: none"> • Mail notices to all FWISD teachers • Notify winners and non-winners by mail • Mail invitations • Maintain RSVP list for luncheon • Staff luncheon <p>RadioShack Teacher Scholar Program:</p> <ul style="list-style-type: none"> • Mail notices to all secondary math and science teachers <p>Both RadioShack and Teaching Chairs Programs:</p> <ul style="list-style-type: none"> • Maintain database of requests for applications • Mail applications to teachers as requested • Maintain database of selection committee members • Send and receive correspondence to teachers and committee members • Staff interviews with candidates <p>Other Event Coordination and Management:</p> <ul style="list-style-type: none"> • Bank of America Breakfast Tours • Outstanding Teacher Recognition dinner • Adont-A-School and Vital Link

<ul style="list-style-type: none"> • Check voice mail messages and delegate • Update changes on all databases • Maintain Communications database • Order buses for all events • Prepare reports, correspondence and event support for four assistant coordinators • Prepare faxes • Run copies • Prepare agendas for weekly staff meetings • Answer phones and take messages for entire department • Prepare layouts for different projects when needed • Assist other team members with projects when needed • Sort and run labels for events and organizations • Maintain different project databases • Flag names for events from Communications database and print labels • Make phone calls to schools for information needed • Assist Communications department with projects when needed • Cover other secretarial positions when necessary 	<ul style="list-style-type: none"> kickoffs • Partners Recognition Dinner • Parent Volunteer Recognition Dinner • Educational Support Personnel Picnic <p>Non Program Specific Duties:</p> <ul style="list-style-type: none"> • Maintain departmental accounting including 10 different budget codes and maintain a monthly budget report • Submit purchase orders • Submit warehouse requisition forms • Submit work orders • Record departmental printing/ mailing costs • Maintain database on PTA/PTO presidents and volunteer coordinators • Maintain volunteer hour records for campuses • Notify, attend and record minutes for Parent Advisory Committee • Keep hospitality equipment and supplies up to date • Answer phones and take messages • Send and retrieve mail • Maintain and record outgoing voice mail messages • Prepare faxes • Run copies • Assist other team members with projects when needed • Assist Communications department with projects when needed • Cover other secretarial positions when necessary
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Source: FWISD School and Community Partnerships.

Because of the difference in pay and difference in workloads compared to similarly classified positions in other departments, the turnover rate has

been high for the lower classified position. Four individuals have filled the position since 1996 and the position is currently vacant. SCP invests time and resources to train new staff only to have them transfer to other departments for less work and more pay and significantly costs the department in terms of staff time spent hiring for the position, training new personnel, hiring temporary workers and staffing the position with other employees.

Recommendation 28:

Reclassify secretarial position in SCP from pay grade 4 to pay grade 5.

By reclassifying this position, SCP will reduce staff turnover and increase overall productivity and effectiveness of service delivery.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The executive director for SCP requests a position upgrade from the director of Employee Services and Operations.	June 2001
2.	The director of Employee Services and Operations approves the position upgrade.	August 2001

FISCAL IMPACT

The average cost of a clerical pay grade 4 position (based on 240 days) is \$30,674, based on a salary of \$26,350 and benefits of \$4,324 (9.35 percent plus \$1,860 health insurance flat rate). The average cost of a clerical pay grade 5 position (based on 240 days) is \$32,833, based on a salary of \$28,325 and benefits of \$4,508 (9.35 percent plus \$1,860 health insurance flat rate).

Recommendation	2001-2002	2002-03	2003-04	2004-05	2005-06
Reclassify secretarial position in SCP from pay grade 4 to pay grade 5.	(\$2,161)	(\$2,161)	(\$2,161)	(\$2,161)	(\$2,161)

Chapter 3

COMMUNITY INVOLVEMENT

B. Community and Business Involvement

FWISD seeks the support of the greater Fort Worth community primarily through the School and Community Partnerships office. The mission of SCP is to develop effective partnerships with businesses, community organizations and non-profit agencies and provide a diverse range of programs and services that build support for the district. The seven staff in SCP are responsible for recruiting businesses and organizations throughout the year. The staff use the volunteer services of a Business Advisory Committee, which meets bimonthly with SCP staff to advise on matters of company recruitment, external communication, public relations and marketing of FWISD programs.

The district also contracts for services with the Fort Worth Chamber of Commerce. In return, the Chamber assists with outreach to national media, recruitment of corporate sponsors for various programs in the district, and provides advice and support to increase school and business partnerships in critical areas. The manager for workforce development at the Chamber works directly with representatives from FWISD and higher education to spotlight employment trends, train teachers to link skills to curriculum and assist in counseling students about possible careers. SCP staff serves on the Chamber's area council boards to communicate district achievements and facilitate district goals.

FINDING

FWISD has initiated various community involvement programs that have established a strong supportive network with local community partners. In 1999-2000, FWISD received \$633,617 in donations from local businesses, universities and community groups, including in-kind donations. In-kind donations are calculated by assessing the market value of supplies, equipment, volunteer hours and any other services provided by donors. **Exhibit 3-6** details monetary and in-kind contributions provided by community support partners.

Exhibit 3-6
FWISD Monetary and In-Kind Contributions
1999 through 2000

Sponsor Organization	Amount
Adopt-A-School Partners*	\$331,014

RadioShack Corporation	\$180,000
Vital Link Host Companies*	\$27,955
Miller Brewing Company	\$25,100
Bank of America	\$5,500
Capital One	\$5,000
Marconi	\$5,000
Bank One	\$5,000
Pier 1 Imports	\$5,000
Intel	\$10,000
FFP Marketing	\$10,000
Lockheed	\$5,000
Southwestern Bell	\$5,000
Citizens Committee	\$3,448
TPM	\$3,000
Texas Christian University	\$2,500
OmniAmerican FCU	\$2,000
Charter Communications	\$1,500
Hillwood Alliance Group	\$1,100
Nokia	\$500
Total	\$633,617

Source: FWISD School and Community Partnerships.

**Contains in-kind donations.*

These funds and in-kind contributions are used to facilitate some of the many community and business involvement efforts initiated by FWISD. The School and Community Relations Department has expanded community involvement enterprises from the original Adopt-A-School program to other programs and initiatives that address the broader spectrum of issues that have an impact on student performance. **Exhibit 3-7** outlines the various business and community partnerships and initiatives provided by FWISD in 1999-2000.

Exhibit 3-7
FWISD Community and Business Involvement Efforts
1999-2000

Program/Initiative	Description
Adopt-A-School Partnerships	220 businesses, organizations and churches representing over 2,500 individual volunteers, partner with 115 schools. Partnership plans are based on individual school needs as stated in their School Education Improvement Plans.
Vital Link Student Internship	Over 250 companies each year host 3,000 sixth graders so that students can see for themselves that the skills they are learning in the classroom are needed for workplace success.
Fort Worth Chamber of Commerce	A liaison has been assigned to support district initiatives. The Chamber lends support for Adopt-A-School and Vital Link recruitment and arranges a superintendent's CEO-to-CEO luncheon. SCP staff members serve on Area Council Boards.
Business Advisory Committee	A diverse 17-member committee meets bimonthly to advise SCP staff on business recruitment strategies, marketing strategies and public relations.
Friends of the Fort Worth ISD	Community groups or individuals who are not Adopt-A-School partners support schools in a variety of ways, including furnishing incentives and guest speakers.
RadioShack Scholars Dinner	Attended by approximately 3,300 people, the dinner recognizes the top 2 percent of students in grades 8-12 and those who have maintained a 4.0 GPA. Ten awards of \$2,000 each are given to secondary math and science teachers.
Parent Volunteer Involvement	Parent volunteers recorded 465,905 hours in 1999-2000. School coordinators are trained by SCP staff to promote volunteerism, place, train, and recognize volunteers.
Chairs for Teaching Excellence	Eight local corporations reward exemplary teachers in 11 disciplines with \$10,000 stipends.
Bank of America Breakfast Tours	Attended by approximately 300 people at 8 different schools, Bank of America invites community leaders into the schools to observe instruction and meet teachers.

Community-wide Kickoff for Business Partners and Parent Volunteers	Underwritten by Charter Communications and OmniAmerican and attended by approximately 385 people, the event is designed to encourage support for district initiatives and to provide tools to help coordinators to improve volunteer activity.
Midwinter Rally	Sponsored by Texas Christian University, the rally brings Adopt-A-School partners together for an update on the district.
Marconi Teacher Grants	Marconi provides grants for creative programs to teachers in schools in two lower socioeconomic areas of Fort Worth.
Outstanding Teacher Recognition Dinner	Underwritten by 80 companies and organizations and attended by approximately 385 people, the dinner honors teachers elected by peers for their contributions to students, faculty and schools.
Educational Support Personnel Recognition	Attended by approximately 1,000 employees and underwritten by TPM and Capital One, the ceremony recognizes and thanks support personnel: teachers aides, school monitors, bus drivers, food service, secretaries, clerks, and warehouse personnel.
Partners Recognition Dinner	Miller Brewing Company awards \$8,750 in cash to outstanding partnerships that recognize and thank business partners for contributions to the district.
Growth Center Project	Pairs at-risk students with mentors who visit them once a week.
Send a Mouse to School	Accepts computers donated from the community and gives them to teachers.
Lockheed Letter Sweater Program	Awards letter sweaters to the top 2 percent of juniors in all FWISD high schools.
Bobby Bragan Scholarship Awards	Awards college scholarship to eighth graders in the FWISD.
Youth Fair Chance	A federally-funded school-to-work program that prepares students in one low socioeconomic area of Fort Worth for work after graduation; it is served by a business advisory committee that places high school students in internships.
Score a Goal in the Classroom	This community wide, privately funded program seeks incentives and recognition for students and teachers in the Fort Worth area. The group solicits

	incentives from area businesses and sports franchises and provides them to schools.
Retirees Recognition Dinner	Members of the Board of Education serve as hosts at an annual dinner and top-level administrators serve as emcees.

Source: FWISD School and Community Partnerships.

COMMENDATION

FWISD effectively reaches out to the community through a variety of innovative partnerships with business and community organizations.

FINDING

FWISD provides recognition and rewards to teachers who provide exceptional service to their students and schools. Since 1982, over 80 businesses in Fort Worth have underwritten an annual outstanding teacher recognition dinner. At the request of the superintendent who saw the need to infuse a new spirit of service, the district established the Chairs for Teaching Excellence award program in 1994 to give deserving teachers recognition for extraordinary contributions and to encourage others to excel. Honored teachers receive \$10,000 cash stipends during an awards luncheon as recognition for exceptional performance. **Exhibit 3-8** details the current sponsor companies and their contributions to the program.

Exhibit 3-8 Chairs for Teaching Excellence Sponsorship 1999-2000

Company	Award Amount
Bank One	\$5,000
Miller Brewing	\$5,000
RadioShack*	\$10,000
FFP Marketing*	\$10,000
Intel*	\$10,000
Lockheed	\$5,000
Southwestern Bell and Performing Arts	\$5,000
Pier One Imports	\$5,000
Total	\$55,000

Source: FWISD School and Community Partnerships.

** Sponsors 2 chairs.*

The district matches the funds provided by local businesses to establish eleven awards of \$10,000 for each recipient of the Teaching Chairs for Excellence award. Eight committees, each made up of a parent, a sponsor company representative, two additional business community representatives and an individual from higher education, oversee the selection process. Over the course of 17 meetings throughout the year, volunteer committee members review teacher applications, conduct interviews with potential recipients, evaluate applicants and select finalists. This process allows representatives from all major stakeholder groups to participate in the recognition of excellence in education, and to shape the standards for future expectations.

COMMENDATION

Through an innovative partnership program with local businesses, FWISD uses the Chairs for Teaching Excellence to recognize and reward outstanding teacher performance.

FINDING

FWISD and the City of Fort Worth have facilitated a unique collaboration on both the policy-making and staff levels. The "Our City Our Children" program, started in 1995, serves as a catalyst for new collaborations and improved working relationships between FWISD and the City of Fort Worth. The mission of the program is "to connect people and to build relationships that will benefit children and youth."

This past year, the City of Fort Worth and FWISD embarked upon a new program that targets 51 elementary and middle schools to provide after school programs in needy areas. Half of the school sites selected were based on the school's socioeconomic status and half based on area crime rates.

In addition to the new after-school initiative, the Our City Our Children program encourages other successful collaborative efforts. Some examples are:

- *Purchasing Directors* - initiated a meeting between the purchasing directors at the city and the district with the intent of taking advantage of contracts negotiated by other governmental entities

- *Grants* - encouraged district and city participation to write 21st Century Learning Centers grants and grants for additional psychologists and counselors at six elementary schools
- *Construction Program* - facilitated session involving city and district staff who reviewed at least 30 proposed construction projects for the district's \$398 million school construction program
- *Communications* - created three newsletters to highlight the collaborations between FWISD and the city and created new web site

The "Our City Our Children" initiative also strives to improve the lives of all young people in Fort Worth by promoting the developmental asset model that focuses attention on identifying and developing the assets children and youth need to succeed. The asset model is an educational methodology that identifies 40 developmental "assets" - positive experiences, opportunities and personal qualities - that children need to be responsible, successful and empathic. Through presentations to community groups, FWISD and city staff, the program aims to build a community support network for youth that works to impart these values to youth in Fort Worth.

COMMENDATION

FWISD has entered into a city-district partnership that funds innovative programs and initiatives to provide support for all children and youth in Fort Worth.

FINDING

FWISD provides a variety of other means to solicit the advice, opinions and unique perspectives of the community at-large. **Exhibit 3-9** details some examples of the diverse range of opportunities for community input that are available on a regular basis.

**Exhibit 3-9
Community Input Opportunities
July through October 2000**

Date	Group	Input To:
July 24	PTA Board Meeting	Executive Director, School and Community Relations
August 11	District 4 Advisory Council	Board Member(s)
August 14	Neighborhood Education Advisorv	Board Member(s)

	Council	
August 15	Students at Fort Worth City Council Meeting Topic: Student Achievement	Superintendent Executive Director, School and Community Relations
August 15	CEO to CEO luncheon sponsored by FW Chamber of Commerce	Superintendent Executive Director, School and Community Relations
August 17	Students at Benbrook City Council Meeting Topic: Student Achievement	Superintendent Executive Director, School and Community Relations
August 24	Special Education Advisory Committee	Board Member(s) Superintendent Director of Special Education
August 24	District Advisory Committee Meeting Pending DEC visit	Executive Director, School & Community Relations Associate Superintendent, School Operation Associate Superintendent, Area II Director, Student Affairs Associate Superintendent, Curriculum Associate Superintendent, Instructional Support Associate Superintendent, Area I Director of Budget Operations
August 24	Hearing: Proposed budget 2000-01	Board Member(s) Superintendent
August 29	Chamber of Commerce - Legislative Issues Task Force	Board Member(s) Executive Director, School and Community Relations

August 29	School board meeting to adopt 2000-01 budget	Board Member(s) Superintendent
August 31	School & Community Partnership Business Advisory Committee	Executive Director, School & Community Relations Lead Assistant Coordinator, Partnerships
September 6	Parent Advisory Committee	Executive Director, School & Community Relations, Partnership Staff
September 7	School and Community Partnership Business Advisory Committee	Executive Director, School & Community Relations Lead Assistant Coordinator, Partnerships
September 11	Fort Worth Council of PTAs Topic: Student Achievement	Superintendent Executive Director, School & Community Relations
September 12	North Area Chamber of Commerce	Assistant Coordinator, S & C Partnerships
September 12	Central Area Council-FW Chapter Topic: Student Achievement	Executive Director, School & Community Relations
September 13	South Area Chamber of Commerce	Assistant Coordinator, S & C Partnerships
September 14	West Area Chamber of Commerce	Lead Assistant Coordinator, Partnerships
September 18	Bank of America Breakfast for Community-SWHS	Board Member(s) Superintendent
September 18	Neighborhood Education Advisory Council	Board Member(s)
September 19	Kick-Off: Adopt-A-School, Vital Link Parent Volunteers	Board Member(s) Superintendent
September 19	District Advisory Committee	Superintendent Associate Superintendent, Area II Associate

		Superintendent, School Operation Executive Director, School & Community Relations
September 20	Quality Workforce Development Committee-FW Chamber of Commerce	Executive Director, School & Community Relations
September 20	North Area Chamber of Commerce	Assistant Coordinator, S & C Partnerships
September 20	East Area Chamber of Commerce	Assistant Coordinator, S & C Partnerships
September 21	Fort Worth Retired Employees Association	Executive Director, School & Community Relations
September 21	Special Education Advisory Committee	Board Member(s) Superintendent Director of Special Education
September 25	Bank of America Tour	Board Member(s) Superintendent
September 25	PTA Board Meeting	Assistant Coordinator, S & C Partnerships
September 28	Superintendent's Community Forum-AHHS	Board Member(s) Superintendent
September 29	Bank of America Tour-Trimble Tech	Board Member(s) Superintendent
October 2	PTA Council	Assistant Coordinator, S & C Partnerships
October 2	District 7 Advisory Council	Board Member(s)
October 17	Special Education Advisory Committee	Board Member(s) Superintendent Director of Special Education
October 12	Neighborhood Education Advisory Council	Board Member(s)
October 13	TEA Parent Involvement Conference	Superintendent Associate Superintendent, Area II Lead Assistant

		Coordinator, Partnerships
October 14	KHNV Media Representative Meeting	Board Member(s)
October 16	Teacher Representative Meeting	Superintendent
October 17	West Area Chamber of Commerce	Lead Assistant Coordinator, Partnerships
October 18	Student Representative Meeting	Superintendent
October 18	Members, Association of Realtors	Board Member(s) Executive Director, School & Community Relations
October 18	East Area Chamber of Commerce	Assistant Coordinator, S & C Partnerships
October 19	District Advisory Committee	Executive Director, School & Community Relations Associate Superintendent, Area II Director, Bilingual/ESL Executive Director, Special Education Associate Superintendent, Curriculum
October 23	PTA Board Meeting	Assistant Coordinator, S & C Partnerships
October 23	Bank of America Tour-Western Hills	Board Member(s) Superintendent
October 25	South Area Chamber of Commerce	Assistant Coordinator, S & C Partnerships
October 26	Superintendent's Community Forum Worth Heights	Board Member(s) Superintendent
Aug-Oct	334 email messages received from public. Queries range from situations involving specific children to requests for general information,	Communications Department

Source: FWISD School and Community Partnerships.

In addition to providing many vehicles for community input, FWISD has staffed most of these meetings with the superintendent, board members or personnel from the senior management team who are best able to act more immediately on community concerns expressed at these meetings.

District inquiries and complaints are handled by the Communications office, which maintains a public information line that many callers use to discuss frustrations and concerns. The main district e-mail address is also managed by the Communications office, which receives 30-35 e-mails per week. Correspondence range from comments from individuals who are upset about students parking on streets near high schools to information requests about a particular school or program. The majority of contacts receive the information itself from communications; others are passed along to appropriate staff, usually in the operations department, for action or additional response. Open record requests are all routed through FWISD's staff attorney.

These multiple avenues for community feedback allow FWISD to gather a broad range of information to actively sustain its program of community involvement.

COMMENDATION

FWISD has formalized a method for receiving a wide range of community input, allowing it to identify and address the needs of a greater portion of the community.

FINDING

FWISD has addressed the educational needs of its adult citizens in the greater Fort Worth area for almost three decades. In 1973, the district established the Dunbar Community School using local resources and skills to make adult education fit the needs of a diverse community.

Exhibit 3-10 provides examples of the various programs and courses provided through the Dunbar Community School.

**Exhibit 3-10
Dunbar Community School Courses
1999-2000**

Program Type	Sample Course Listing/Description
Educational Improvement Programs	Internet Usage/Web Development Windows 95/98 Microsoft Office (Word, Excel, PowerPoint and Access)

	Resume Preparation Job Interview Skills Office Procedures Basic Word Processing Basic Computer; PC/Mac Desktop Publishing Lotus 1-2-3 Keyboarding I and II Speed Reading ESL/English for Spanish Speaking Adults
Vocational Programs	Upholstery Furniture Finishing/Refinishing Auto Mechanics Nursing Assistant Cosmetologist Operator's License Manicure Shampoo Technician Sewing I and II
GED Program	Provides classes and study materials for students of any age who wish to obtain a high school equivalent GED
Tutoring Academy	After school tutoring for students of all ages Assistance with homework and enrichment activities in all subject areas serving K-8 SAT preparation
Community Service Programs	West Texas Legal Services Senior Citizens Programs Defensive Driving Meeting space for reunions, booster clubs and other meetings
Special Programs	Parenting Workshops Spanish Sign Language Small Business Planning Introduction to Real Estate
Youth Programs	FWISD Summer Fine Arts Program Fine Arts Touring Program Gospel Choir Latch Key Program
Recreational Programs	Adults: Diet and Weight Management Youth: Basketball, Volleyball, Softball and Track

Source: Dunbar Community School Class Schedule.

Courses at the Dunbar Community School are inexpensive; once students pay \$5.00 for registration and \$3.00 for an identification card, the

individual classes are free. Free childcare is also offered for enrolled students. Professionals in the community donate instructional time and services, which allows the district to provide these services at such a low cost. The program's affordable price and free childcare provide an opportunity for district parents and community members to start or continue an education while still maintaining a job.

The Community School Advisory Council (CSAC), staffed by volunteer community leaders, provides oversight and direction for the community school through bimonthly meetings. Because "widespread citizen participation is the key factor in the success of the community school process," the CSAC involves all its community partners in directing the school and its curriculum.

The Dunbar Community School is the center of the community, operating in partnership with various community agencies and groups to serve the educational, cultural and recreational needs of each individual enrolled in the program.

COMMENDATION

FWISD provides a comprehensive, diverse adult education program that is available to all members of the community at an affordable cost.

Chapter 3

COMMUNITY INVOLVEMENT

C. Parent Involvement

"More than 20 years of research indicate that children benefit from family-school collaborations, which provide parents with opportunities to shape their children's learning."

- Dr. Heather Weiss, Harvard Family Research Project

Parental involvement has become recognized as a necessary and important component in increasing student achievement levels, improving attendance, fostering more positive attitudes and behaviors, and increasing the likelihood of enrollment in higher education. Districts that have a strong parental component as part of their community involvement programs typically produce higher positive outcomes for their children. They can also be an important tool for increasing parental and community participation.

However, districts that recognize the importance of parental involvement, still face many challenges when designing their programs. These include meeting the needs of the district's diverse communities while still sustaining its high level of service quality, identifying and maintaining funding resources, ensuring parent's continuing engagement in their children's education, and understanding the capacity of school districts to implement and maintain these types of initiatives.

FINDING

FWISD has initiated a number of district and school-based community involvement efforts to promote parental involvement. Some examples of these efforts include:

- *Parent Volunteerism* - Each school has a parent volunteer coordinator who is responsible for promoting volunteerism and recording volunteer hours.
- *Parent Teacher Association chapters* - 85 PTA school chapters promote parental involvement and parent education and lend support to schools.
- *Parent Advisory Committee* - A diverse 15-member committee meets monthly to advise and discuss parent issues with SCP staff.
- *Parent Volunteer Recognition Dinner* - Attended by more than 1,000 people, the dinner recognizes and thanks parent volunteers who have logged 100 or more hours during the year.

To measure the level of success of these parental involvement initiatives, the district convened a review team that conducted a survey of 766 district staff, including principals, assistant principals, teachers and administrative personnel. The results of some of the survey questions follow.

The majority of respondents agreed or strongly agreed that FWISD maintains open lines of communication with parents. **Exhibit 3-11** details the results of this survey question.

Exhibit 3-11
September 2000 TSPR Survey
Responses to the following survey question: "The district regularly communicates with parents"

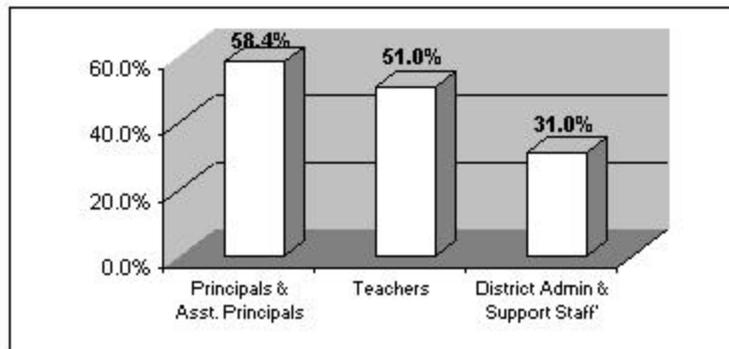
	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
Principals & Asst. Principals	12.9%	75.2%	4.0%	7.9%	0.0%
Teachers	8.0%	54.8%	11.8%	20.8%	4.6%
Administrative & Support Staff	6.3%	49.0%	24.3%	18.0%	2.5%

Source: TSPR Survey.

As can be expected, volunteers are not equally involved across all 120 schools in FWISD or do not have a sufficient number of volunteers. Results from the employee survey confirmed this. Many of FWISD employees - 58 percent of principals and assistant principals, 51 percent of teachers and 31 percent of administrative and support staff - do not believe their schools have a sufficient number of volunteers to help students and school programs (**Exhibit 3-12**).

Exhibit 3-12
TSPR Survey Results September 2000
Percent Dissenting Responses to the survey question:

"Schools Have a Sufficient Number of Volunteers"



Source: TSPR Survey.

In addition to the survey, FWISD conducted focus groups on these issues and found that elementary and secondary principals expressed concern for the inconsistency of parent contributions among schools and acknowledged that it was an issue facing districts across the country. Principals in the district also concurred that the districtwide initiatives in FWISD provide the support, training, and tools necessary to promote parent involvement.

FWISD has a parent volunteer program implemented at every school in the district. An unpaid coordinator is appointed by each principal or elected by the PTA/PTO. The coordinator is responsible for recruiting, training, monitoring and recognizing volunteers. In 1999-2000, these coordinators recorded a total of 465,005 volunteer hours provided by parents in the district. The Independent Sector, a nationally recognized coalition of leading nonprofits, foundations and corporations, reports that the dollar value of volunteer time was assessed at \$14.83 per hour in 1999. This values FWISD's parent volunteer hours alone as a \$6,896,024 in-kind contribution for the district.

This level of parental volunteerism is another indicator of the success of the district's efforts. Moreover, an opinion survey conducted in September 2000 demonstrates that community perception of FWISD's parent volunteer efforts is also favorable. The review team conducted a telephone survey in September 2000 of individuals living in the greater Fort Worth area. The majority of survey respondents either agreed or strongly agreed that parents were welcome in FWISD schools and provided with opportunities to participate in school activities and organizations. **Exhibit 3-13** details these responses.

Exhibit 3-13
Fort Worth Public Opinion Survey
September 2000

Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
FWISD parents are given opportunities to play an active role in public schools.	15.0%	65.6%	11.1%	7.0%	1.4%
FWISD parents feel welcome when they visit a school	15.3%	59.6%	14.8%	8.2%	2.1%
FWISD parents participate in school activities and organizations	7.5%	50.8%	19.1%	19.3%	3.3%

Source: TSPR Survey.

Despite some unmet needs in certain schools, current district efforts in promoting parent involvement have resulted in almost \$7 million in savings realized through the volunteer efforts of its parents.

COMMENDATION

FWISD has established programs that provide opportunities for parents to become involved in schools, resulting in significant savings for the district.

FINDING

FWISD's superintendent is visible and accessible to the parents and the community at large. In order to seek input on educational issues from students, parents and the greater Fort Worth community, the superintendent conducts a series of public forums every month at a different school. Spanish and sign language interpreters are present to facilitate dialogues between the district and all its participating stakeholders. These events are publicized in local newspapers, schools, through invitations sent directly to parents, on the FWISD television stations and in various community newsletters.

School and Community Partnership staff attend the events to obtain feedback and incorporate suggestions into future planning. SCP staff recently conducted an evaluation of the effectiveness of the forums by analyzing attendance trends. When participation in the forums had dropped to fewer than 10 or 15 parents and community members per meeting, staff surveyed parents and general community to determine methods for increasing interest and boosting participation. The surveys

indicated that PTAs and site-based teams were the best vehicles for publicizing the events and enlisting support and as a result of these new outreach efforts attendance increased to more than 150 parents and community members, saving the district approximately \$7,000 in flyer production costs.

COMMENDATION

FWISD provides parents and the general community a direct line of communication with the superintendent through monthly community forums held at schools throughout the district.

Chapter 3

COMMUNITY INVOLVEMENT

D. Communications and Public Relations

District communications includes both internal and external communications. Internal communication refers to the distribution of information within the district, while external communication addresses district stakeholders and constituents.

The Communications office disseminates information through newspapers, press releases, Public Service Announcements, newsletters, brochures, the FWISD web site and programming on the district cable channel to conduct its internal and external communications, media relations and special event promotion functions.

FINDING

The Communications department communicates with internal and external constituents through a variety of publications and the World Wide Web. Since the district's student enrollment is 43 percent Hispanic and has a large Vietnamese population, external promotional information is published in English, Spanish and Vietnamese. Examples of these publications include:

- *FWISD News Page* - weekly newsletter of district and community events.
- *Neighborhoods Fort Worth: Partners for Progress* - annual publication provided to neighborhood associations and individuals describing ideas on how to partner with FWISD schools.
- *Here's How to "Send a Mouse to School"* - informational brochure provided to individuals and companies with guidelines and procedures for donating computer equipment to the district.
- *FWISD Annual Report* - annual report distributed to all parents and local businesses summarizing the district's progress for the year and outlining goals and objectives for the year to come.

Examples of internal communications publications include:

- *Daily News Clippings* - daily compilation of all newspaper articles in which FWISD appears.
- *Web Page Standards and Guidelines* - annual publication provided to principals and department heads with guidelines and standards for posting information to the district's website.

- *Highlights of Reading Recovery* - informational brochure distributed to teachers and available at campuses implementing the Reading Recovery program.

After the Communications office began receiving complaints that the districts' website was hard to use and inaccurate, the Fort Worth Association of Realtors agreed to provide funding to purchase a server and produce a website. The district's web site is now well designed, informative and easy to navigate. It features information regarding district events, school board meetings, and campus activities.

These promotional efforts are producing positive results for the district. During the telephone survey conducted in September 2000, the majority of survey respondents either agreed or strongly agreed that the district has established a good public relationship with the community. **Exhibit 3-14** details these responses.

**Exhibit 3-14
Fort Worth Public Opinion Survey
September 2000**

Statement	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
FWISD administration promotes good public relations between district and community.	5.8%	55.7%	18.2%	17.7%	2.7%
Communications are good between FWISD district administration and the community.	5.4%	51.6%	18.5%	22.3%	2.2%
The community is proud of the public school education in FWISD	4.6%	56.4%	17.1%	19.3%	2.7%

Source: TSPR Survey.

COMMENDATION

The Communications Department publishes a comprehensive set of materials to inform community members and district personnel about FWISD accomplishments and activities.

FINDING

Each school in the FWISD has a designated school communicator who is responsible for ensuring that the district's internal and external communications are coordinated, accurate, responsible and timely. These individuals are responsible for interactions with the media, disseminating school information to their community and for coordinating information between district office and their school.

All school communicators receive ongoing training from the Communications office. The training includes tips for written and oral communication, how to identify and publicize school successes, and guidance for communicating with the media. For instance, during one training session on media communication, the office invited a reporter to discuss the types of information that are of interest to the media, how to respond to media questions, and how the media interprets information.

COMMENDATION

The district's communication coordinators are an effective mechanism for facilitating internal and external communication functions.

Chapter 4

PERSONNEL MANAGEMENT

This chapter reviews the Fort Worth Independent School District's (FWISD) personnel management in five sections:

- A. Organization and Management of Personnel
- B. Salaries and Benefits
- C. Recruiting and Hiring
- D. Employee Management and Performance Appraisals
- E. Professional Development

School districts are often one of the largest employers in their communities, and personnel costs are typically the largest expenditure of any school district. On average, they account for 80 percent of a district's expenditures. As a result, efficient and effective management of personnel is critical to the overall effectiveness of a district.

A district's personnel department is responsible for recruiting, interviewing, selecting and retaining new employees; for processing promotions, transfers and resignations; and for determining and maintaining compensation schedules, employee records, and job descriptions. The department will also manage employee evaluation processes, employee complaints and grievances, while ensuring employment laws, regulations and policies are followed.

A human resources department will also coordinate some duties with other district departments:

payroll is coordinated with the Finance department; staff development with all participating departments; and benefits with the district's risk management, which may be located in the human resources department.

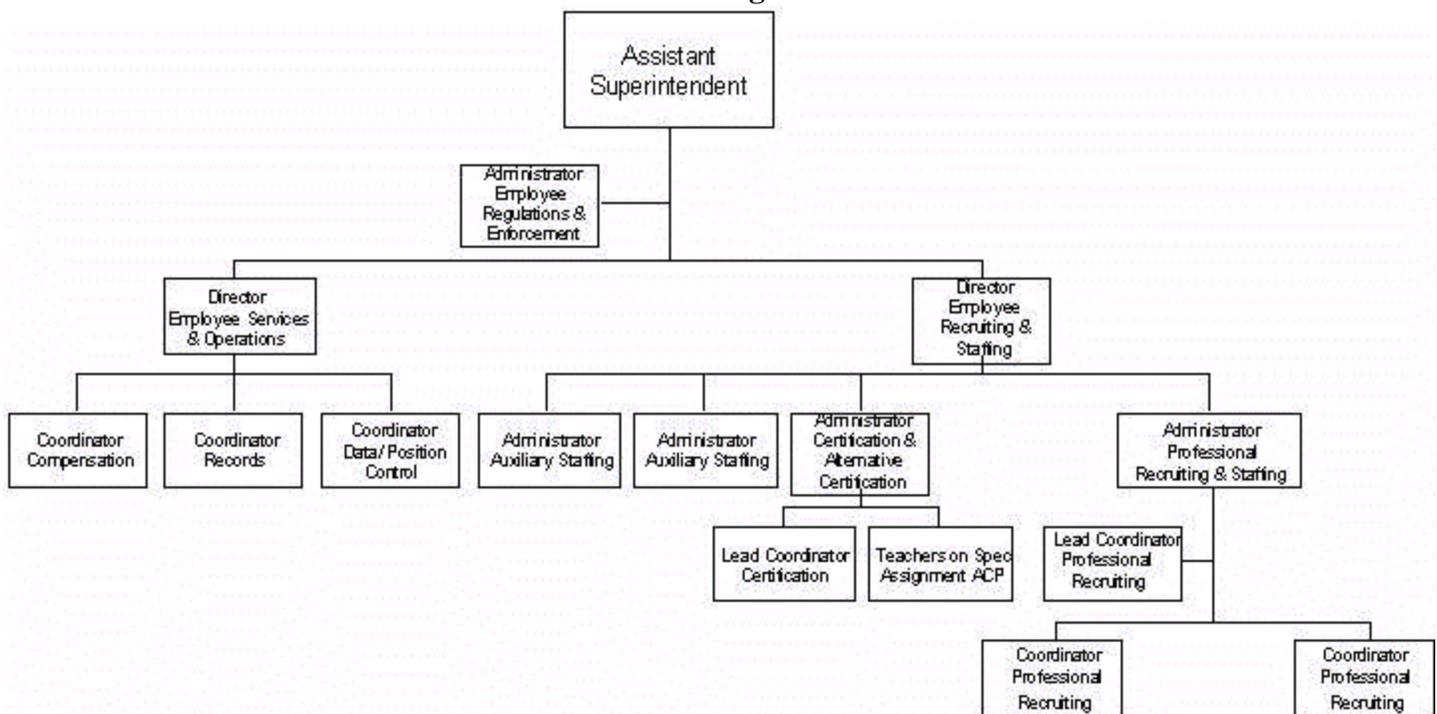
Chapter 4

PERSONNEL MANAGEMENT

A. Organization and Management of Personnel

There are 45 permanent positions in FWISD's Human Resources department: one assistant superintendent; two directors; five administrators; two lead coordinators; two teachers on special assignment; seven other professional staff members; 12 secretaries and 14 clerks. The organization chart is presented in **Exhibit 4-1**.

Exhibit 4-1
Human Resources Organization



Source: FWISD Human Resources Department.

The director of Employee Recruiting and Staffing oversees the hiring and staffing of district employees. This includes posting positions, recruiting, coordinating the selection and interviewing of applicants, processing new hires and ensuring certification requirements are met. The administrator for Recruiting and Staffing and the positions under this administrator focus on teacher recruitment. Auxiliary hiring and staffing is managed by the two administrators for Auxiliary Staffing.

The director of Employee Services and Operations oversees activities related to compensation, employee records and position control.

Responsibilities of the administrator of Employee Regulations and Enforcement include new employee orientation, employee assistance programs, assisting with disputes and employee performance problems, processing leaves of absence, and providing employee assistance in processing retirements.

FWISD's Human Resources staffing is comparable to its peer districts. **Exhibit 4-2** compares the number of human resources personnel to the number of employees in peer districts.

Exhibit 4-2
Human Resources Staffing Compared to Peer Districts
1999-2000

District	Number of Human Resource Employees	Total District Employees	Ratio of HR Staff to Total District Employees
Fort Worth	45.00	9,115.0	1:203
Austin	43.75	9,558.1	1:218
Dallas	84.00	17,480.2	1:208

Source: Academic Excellence Indicator System (AEIS), 1999-2000. Human Resources staff numbers from peer districts.

The district's human resources staff supports the district's 9,115 employees. Staffing has increased slightly since 1997-98 (**Exhibit 4-3**).

Exhibit 4-3
District Employees

	1997-98	1998-99	1999-00	Percent Change, 1997-98 to 1999-2000
Total Staff	8,791.8	8,971.1	9,115.0	3.7%
Teachers	4,313.5	4415.7	4,596.0	6.5%
Professional Support	729.2	772.1	814.9	11.8%
Campus Administrators	275.8	286.8	278.5	1.0%
Central Administrators	48.0	42.0	60.0	25.0%
Educational Aides	742.4	750.4	748.8	0.9%
Auxiliary Staff	2,682.9	2704.2	2,616.7	-2.5%
<i>Students</i>	<i>76,901.0</i>	<i>77,956.0</i>	<i>78,654.0</i>	2.3%

Source: AEIS.

During 1999-2000, FWISD spent about \$3 million on human resources. The two largest expenditure categories were professional and support salaries, but the third highest was hiring incentives (**Exhibit 4-4**).

**Exhibit 4-4
Human Resources Expenditures
1999-2000**

Category	Amount
Auto Allowance	\$16,267
Consulting Services	83,232
Employee Allowances	27,999
Extra Duty Pay - Professional	6,504
Extra Duty Pay - Support	23,263
Fees & Dues	51,145
General Supplies	95,529
Health & Life Insurance	60,642
Hiring Incentives	378,000
Misc. Contracted Services	174,963
Maintenance/ repair furniture/ Computer/ Equipment	16,615
Non-contract support personnel	109,532
Other reading materials	24,299
Other supplies/ maintenance	795
Rentals- furniture/ computer/equipment	6,863
Salaries - support personnel	635,008
Salaries - professional	971,484
Social Security/Medicare	29,421
Staff tuition and fees	25,385
Substitute/Professional Staff	30,938
Support Substitutes	203
Teacher retirement/Teacher Retirement System Care	700

Technology Equipment	8,817
Temporary/Hourly Professionals	100,704
Testing Materials	2,270
Travel - employee only	107,427
Travel - students	32
Unemployment Compensation	2,523
Utilities - telephone	3,167
Workers' Compensation	26,031
Total	\$3,019,758

Source: FWISD Expenditures, Finance Department.

FWISD uses several software packages to manage its human resource data. The Comprehensive Information Management for Schools System (CIMS) is the primary software package. All district employee information is entered onto CIMS, and the department can then use the software to record demographic information, staffing assignments and salaries. The department uses an automated substitute teacher calling system, Telecommunications Support Systems (TSSI), and Resumix, an automated application process for teachers. The department also uses the Smeadlink bar coding system to control access to personnel files.

Human Resources staff members attend training to improve their ability to perform their jobs. Between September 1999 and June 2000, staff attended trainings on Resumix, TSSI, FMLA, personnel law, labor law, Workers Compensation Law, immigration, records management, employment law, and EEOC.

FINDING

The department has two vacancies among its upper management positions, and the job descriptions for these positions do not include a human resources background either as a prerequisite for the assistant superintendent position or as a strong preference for other human resources positions.

For the first three months of the 2000-01 school year, the Human Resources Department had vacancies in three of the five leadership positions: the assistant superintendent; the director of Employee Recruiting and Staffing and the administrator of Certification and Alternative Certification. The assistant superintendent position was filled in November 2000, more than four months after it became vacant. In January 2001, an administrator of Auxiliary Staffing was promoted to director of Employee Recruiting and Staffing pending board approval. The administrator of Certification and Alternative Certification position has been left vacant pending a change in that program.

Only two of the professional positions in the Human Resources department are filled with individuals who have a human resources background: assistant superintendent for Human Resources and administrator of Auxiliary Staffing.

The job descriptions for the assistant superintendent, directors, and administrators require degrees in related fields, but the job descriptions for those positions do not state what these fields should be. **Exhibit 4-5** lists the qualifications in the job descriptions related to human resources. The job description for the director of Employee Services and Operations requires five years of experience in human resource management, but the job description for the other director position states only that this is preferred experience. Of the four job descriptions for administrative positions, one requires five years of related experience in human resource management and one requires five years legal or labor relations experience, but the other two require only related experience. The experience requirements are so broad they could include even remotely related activities.

Exhibit 4-5
Summary of Job Description Qualifications related to Human Resources
1999-2000

Position	Qualifications
Assistant Superintendent for Human Resources	<ul style="list-style-type: none"> • Master's degree in a related field • Seven years of experience including five years administrative experience and demonstrated leadership in a position that emphasized human resources management • Knowledge of federal and state laws governing human resource issues
Director - Employee Recruiting and Staffing	<ul style="list-style-type: none"> • Bachelor's degree in a related field • Master's degree in education preferred • Five years experience, preferably in a human resources capacity • Thorough knowledge of all applicable federal and state laws governing employment issues
Director - Employee Services and Operations	<ul style="list-style-type: none"> • Bachelor's degree in a related field • Five years experience in human resource management • Must have experience in negotiating with employee organizations • Experience in designing, conceptualizing or administering human resources management systems, including data management, compensation and position control • Knowledge of all applicable federal and state laws governing personnel issues
Administrator - Employee Regulations and Enforcement	<ul style="list-style-type: none"> • Bachelor's degree in a related field • Five years legal or labor relations experience
Administrator - Auxiliary and Non-instructional Staffing	<ul style="list-style-type: none"> • Bachelor's degree, preferably in human resource management • Five years related experience in human resource management

	<ul style="list-style-type: none"> • Knowledge of all applicable federal and state employment laws
Administrator - Certification/Alternative Certification	<ul style="list-style-type: none"> • Bachelor's degree in education, Master's preferred • Five years related experience • Thorough knowledge of state laws and regulations regarding certification and alternative certification
Administrator - Professional Recruiting and Staffing	<ul style="list-style-type: none"> • Bachelor's degree in education, Master's preferred • Five years related experience • Thorough knowledge of state and federal laws and regulations governing employment

Source: FWISD job descriptions.

With the changing labor market and legal environment, an employer of more than 9,000 staff must have a high level of human resources expertise. The current and future openings provide an opportunity to improve the overall expertise in the department.

Formal education and training in human resources is important for several reasons. The additional technical expertise exposes individuals to cutting-edge ideas that are covered in the classroom and gives the individuals greater ability to evaluate and resolve problems. The expertise also increases the individual's credibility in interactions with other professionals in the organization. In order to be fully effective, the assistant superintendent should have the same level of technical expertise as the other leaders in the organization. This lack of expertise may have affected several recent decisions to implement consultant recommendations relating to software that have reduced productivity. Formal training and broad experience increases the individual's knowledge of innovative human resource practices, and the additional technical skills transfer to all employees, increasing the skills of the entire department and reducing the need for external support.

A background in human resources, including either a Bachelor's or Master's degree in Human Resource Management, is particularly important for upper management positions including administrators and directors. Without this background and experience, the district must rely more heavily on outside consultants and cannot maximize the effectiveness and efficiency of the office. In addition, without sufficient human resource background and training, the district is increasing the risk of employee litigation.

In most companies, individuals with strong human resource training and education hold positions in human resources.

Recommendation 29:

Increase professional requirements for Human Resource Department administrators.

The district should consider changing the degree requirements for the assistant superintendent and directors to require a Bachelor's or Master's degree in human resources management. It should also consider changing the degree requirements for the administrators, excluding the administrator for Certification and Alternative Certification and the administrator for Professional Recruiting and Staffing, to require a Bachelor's degree in human resource management or at least nine credit hours of study in human resources. There are numerous colleges in the state that provide Bachelor's or Master's degrees in Human Resources including, North Texas State, the University of Dallas, Abilene Christian University, the University of Texas-San Antonio, and Texas A&M University

The district should also expand the experience requirements to include specific experience in the design and evaluation of human resource activities related to the job.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent appoints Human Resources staff members to establish professional requirements for all future hires in the department to include Bachelor's or Master's degrees in Human Resources and broad human resource experience for professional and managerial levels.	June 2001
2.	The superintendent or his designee hires individuals with the additional required skills and experiences as openings occur.	Ongoing

FISCAL IMPACT

This recommendation could be implemented with existing resources.

FINDING

While the strategic plan for the Human Resource Department presents sound goals, it lacks the details required to ensure success. The strategic plan was developed in 1999, and includes belief statements, a mission statement, strategic policies, objectives, main strategies, highlighted strategies and action plans. The objectives and strategies are not measurable or quantifiable, so it is difficult to know when desired performance has been achieved.

For example, the three objectives are to staff every position with the most qualified individuals who are competent, caring and committed to student success; every human resources process and procedure will be established with the customer in mind and all human resources employees will be held to high levels of professional achievement. In addition to the objectives, there are seven main strategies. Each of these is supported by several highlighted strategies, and each highlighted strategy is accompanied by an action plan.

An example of one of these main strategies along with the accompanying information is provided in **Exhibit 4-6**. As the exhibit shows, the format includes specific steps, the people responsible for these steps and implementation dates, however, the strategies themselves are not objective or measurable and the implementation dates are not specific.

Exhibit 4-6
Sample Main Strategy, Highlighted Strategy and Action Plan

Main Strategy: FWISD will recruit and staff every position with the most qualified individuals who are committed to high academic achievement for all students			
Highlighted Strategy 1: Develop recruiting and staffing as a total package			
Specific Steps (activities)	Responsible Group/ Department	Assigned to	Implementation Date
Develop an application process for teachers, administrative, professional and auxiliary applicants.	Staffing Departments	Department Heads	Ongoing
Develop a process for collecting and organizing needed documents.	Staffing Departments Records Departments	Arcadio Garcia Yassmin Lee Terry Buckner Charlie Zeller Birdie Avant Jane Cumbie Sharon Warren	Ongoing
Design a process for staffing all positions in a timely manner.	Staffing Departments	Elene Ondo Department Heads	Ongoing
Assess the effectiveness of the program by monitoring vacancies on a monthly basis.	Staffing Departments	Elene Ondo Department Heads	Ongoing

Source: Strategic Plan 2000, FWISD Human Resources Department.

In addition, there have been no progress reports on the plan's implementation.

Without measurable objectives, it is difficult to know when objectives have been met. Without specific deadlines, it is difficult to ensure the plan progresses in a timely manner and without status reports, there is no way of knowing how the plan is progressing.

A good strategic plan has quantifiable and measurable objectives, specific timeframes for completing tasks and periodic status reports.

Recommendation 30:

Define specific objectives and dates for the Human Resources strategic plan and begin producing status reports.

The new assistant superintendent for Human Resources should review the plan and solicit input from staff. The group should work together to validate the belief statements, a mission statement, strategic policies, objectives and the main strategies. Once agreement has been reached on these, each main

strategy should be assigned to an individual who will be responsible for developing the detailed strategies and action plans. Another individual should be responsible for developing a format for reporting status on the plan.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent for Human Resources convenes a committee to review the plan.	June 2001
2.	The committee reviews and revises the plan.	July 2001
3.	The assistant superintendent for Human Resources assigns individuals to add details to the strategies and develop a format for the progress report.	July 2001 - August 2001
4.	The assistant superintendent for Human Resources approves the plan.	August 2001
5.	The assistant superintendent for Human Resources issues the first status report.	November 2001

FISCAL IMPACT

This recommendation could be implemented with existing resources.

FINDING

All district personnel files are kept in a fireproof vault in the personnel department, and the district uses its Smeadlink bar coding system to track files. All files are bar coded. When they are checked out, a scanner is run over the bar code on the file and over the bar code of the borrower to log who has checked out each file.

The department also has a documentation index that should be maintained in each individual file. For administrative and professional staff, the file contains three parts: Part I is for materials required by TEA, such as contracts, certification information, evaluations and transcripts; Part II is FWISD-required items, such as résumé, application and tax forms; Part III includes miscellaneous data such as appropriate job descriptions, leave of absence data and requests for records. For clerical/technical, manual trades, and substitute/part-time employees, the file includes two parts: Part I includes the contract, résumé, and letters of reference; Part II includes requests for records, in-service data, evaluations, applications and tax forms.

The district also has documented guidelines that explain access privileges to personnel files. For example, the guidelines identify who may view all file components, who may view all components other than the confidential components and which restrictions apply to third party requests for information.

An analysis of a sample of the files revealed they contained only relevant employment information. The district maintains the appropriate, separate files for medical and other restricted information.

COMMENDATION

FWISD effectively manages access to its personnel files through a bar coding system, and the content of personnel files through documented guidelines.

FINDING

The Human Resources Department maintains job descriptions for the district, but the process is cumbersome and time-consuming. The district's job descriptions are stored within Microsoft Word documents. There is one Word document for each department or area within the district, and that document contains all the job descriptions for that area or department. While the approach is not uncommon, the task of updating job descriptions is cumbersome, and it increases the likelihood that job descriptions are not kept current. In addition, the person responsible for maintaining job descriptions spends about 10 to 15 hours each week responding to requests from district employees for copies of job descriptions.

Job descriptions within FWISD are specific to the area in which the individual is working. For instance, a job description for a secretary will include the information common to all secretaries in the district as well as the information specific to the department in which he or she is working. As a result, there are numerous versions of each core job description.

When there is a change to the core job description due to a change in state law or district policy, human resources staff must find each version of that job description within each of the department level Word documents and make the same change for each version. Rather than make all of these changes at once, the district maintains a reminder sheet of the changes needed. When a request for a job description is created or changed, the reminder sheet is reviewed to see if any changes are necessary before distributing the job description.

Changes to job descriptions are made upon request, typically when a position has been vacated. Job descriptions are not reviewed and updated on a regular schedule. As a result, it is possible for a job description to go unchanged for years. It is likely that the responsibilities of the position have changed over time and that the changes have never been documented.

Since job descriptions are a key element in compensation studies and performance evaluations, out-of-date job descriptions can compromise the effectiveness of other activities.

Under good human resource practices, job descriptions are reviewed on a regular basis to ensure they accurately and thoroughly reflect the responsibilities of the position.

Recommendation 31:

Streamline job description maintenance, and update job descriptions at least every three years.

The district should develop or purchase Web-based software to maintain job descriptions in a relational database. The software package will allow the district to maintain accurate job descriptions while reducing the time spent on related activities. The software would provide district personnel with direct access to the job descriptions, saving time spent requesting and processing job descriptions.

The cost of either development or purchase can be offset by the reduced time assigned to maintaining the system and supporting staff requests. Since purchasing off-the-shelf software is typically less expensive than developing software, the district should first conduct a search for available packages. If they are not satisfied with the options, they should work with the Information Services staff to develop a customized package.

The district should also begin reviewing job descriptions every three years. Job descriptions should be categorized into three groups, and one group should be reviewed each year. The review should consist of getting input from those in the positions as well as those who manage the positions to ensure the description is accurate.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent appoints a member of staff to research potential packages. The team researches features and prices of existing products.	June 2001
2.	The Information Services department estimates what it would cost to develop the software in-house.	September 2001
3.	The purchasing department develops a Request for Proposal to solicit bids for an outside contractor to develop the software.	October 2001
4.	The assistant superintendent for Human Resources reviews the existing software, the external proposals and the cost for developing the software and decides on the most efficient means of obtaining the software.	November 2001

FISCAL IMPACT

An existing software package could cost between \$5,000 and \$10,000 including customization. A new customized program will cost about \$15,000 to \$25,000, including the addition of features such as automated performance appraisals. For this fiscal impact estimate, the highest of these costs was used, and an ongoing annual maintenance cost of \$2,000 is included.

Recommendation	2001-2002	2002-03	2003-04	2004-05	2005-06
Streamline job description maintenance and update job descriptions every three years.	(\$25,000)	(\$2,000)	(\$2,000)	(\$2,000)	(\$2,000)

FINDING

The Human Resources Department does not produce regular performance reports. Individual areas occasionally produce reports to provide an update on particular activities. For example, the department has produced reports on teacher hiring and recruiting efforts to summarize the year's efforts and results in these areas.

Performance measures provide managers with tools to assess how particular areas are performing over time and whether they are meeting goals. By monitoring them on a regular basis, the manager can identify when a particular area is not meeting expectations and can take steps to address the problem.

Measures can be developed for various areas within Human Resources and may include:

- Turnover by position, department and campus;
- Absentee rates by position, department and school;
- Average time to fill vacant positions;
- Ratio of offers to acceptance;
- Quality of recruiting sources: number of applicants and acceptances, quality of new hires, cost per hire, time to hire, etc.;
- Human resources response time from requisition to interview;
- Management response time from interview to job offer;
- Average compensation compared to the market rate;
- The number of exceptions to district policy;
- Percent of performance appraisals for each overall rating; and
- Percent of late performance appraisals by department.

The department collects some of this information, but without these measures and regular reports, it is impossible for department leadership to measure the department's efficiency and effectiveness and to identify areas in need of improvement or streamlining.

Recommendation 32:

Develop performance measures and standard reports for the Human Resources Department.

The department should develop a set of performance measures and targets, or benchmarks, for each to determine their effectiveness.

The department should define how each measure is calculated and set annual targets for meeting them. These targets should be tied to the department's strategic plan, which should be tied to the district's strategic plan. Progress towards targets should be tracked throughout the year and incorporated into regular reports for departmental leaders.

The district may want to consider expertise in establishing Human Resources audits as part of the hiring standards for one of the open positions.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent appoints a committee of Human Resources staff members to establish performance measures for the Human Resources department.	July 2001
2.	The committee conducts research to establish benchmarks for the measures. The research includes a survey of peer districts to establish external standards.	July 2001 - August 2001
3.	The assistant superintendent finalizes the measures and the benchmarks.	September 2001

4. The department begins collecting data, calculating measures and producing standardized quarterly and annual productivity reports.	September 2001
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FISCAL IMPACT

Implementation may require additional training. There will also be minimal costs for support materials and conducting the peer survey, but these should be offset by improved efficiency.

FINDING

The Human Resources department does not have detailed documented procedures for many of its activities, and those procedures that do exist are not centrally organized. Some procedures for some employees are documented in manuals and memos. For district employees, an explanation of some procedures is included in the New Employee Orientation manual. For example, the manual describes briefly whom employees should contact regarding grievances and complaints, the process for using personal days and procedures for resigning. For applicants, there are memos providing instructions for the application process. For Human Resources staff, procedures or instructions are documented for some activities. There are procedures for screening, interviewing and selecting potential employees; there is a checklist for what should be in a personnel file and documentation for who can view which parts of a personnel file and the Compensation Plan provides descriptions for how compensation is adjusted for promotions and demotions.

The department does not have documentation for many of its procedures. For instance, there is no documentation for how employee records are updated or how new positions, employee hires and transfers are entered into the position control system. This does not mean that these activities are not performed well. It does mean that when there is turnover in the department, it will be hard for the new staff to learn how to do things.

The lack of a standardized operating procedure manual places the district at risk if an employee leaves the organization and increases the time needed to train new employees.

United ISD has a procedures manual that describes services performed by the department, timelines for processing personnel transactions, procedures for hiring, requirements for personnel files and certification, benefits and leave plans for employees, programs for substitutes, guidelines for staffing and schedules for salaries.

Recommendation 33:

Develop a procedures manual for the Human Resources Department.

The assistant superintendent of Human Resources should develop a table of contents for a procedures manual and assign individuals within the department to develop procedures for their areas. The manual should include procedures and requirements for:

- Posting positions;
- Recruiting;

- Screening and interviewing;
- Selecting and hiring;
- Conducting performance appraisals;
- Creating new positions and upgrading positions;
- Processing grievances;
- Handling terminations and resignations;
- Maintaining employee records and job descriptions;
- Processing promotions and transfers;
- Maintaining compensation, benefits and leave plans for employees; and
- Timelines for processing personnel transactions.

The manual should include a table of contents, an index and copies of forms and computer screens used to perform procedures. Once procedures have been submitted, a committee should review the procedures not only to ensure they are clear and complete, but to make sure the procedures are accurately described and efficient.

The district should develop a schedule for reviewing and updating the procedure manual on a regular basis.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent of Human Resources develops a table of contents for the procedures manual.	July 2001
2.	The assistant superintendent assigns staff to develop procedures.	July 2001
3.	Human Resources Department personnel develop procedures, submit them to the assistant superintendent of Human Resources for review, and ultimately submits them to a district policy and procedures specialist.	July 2001 - August 2001
4.	The assistant superintendent establishes a committee to review the procedures for accuracy and efficiency.	September 2001
5.	The committee reviews the procedures	September 2001 - October 2001
6.	Procedure manual is finalized and distributed.	November 2001

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 4

PERSONNEL MANAGEMENT

B. Salaries and Benefits

To attract and retain qualified employees, a district must offer competitive salaries and benefits. FWISD's Compensation Plan is the basis of compensation for district employees. The plan is based on the district's compensation philosophy that the pay system shall provide appropriate pay for the assessed worth of individual jobs. The system is administered to ensure it:

- Stays competitive with appropriate labor markets so the district may attract and retain qualified personnel;
- Reflects the levels of skill, effort and responsibility required for different jobs;
- Rewards continued length of service to the district;
- Remains fiscally controlled and cost-effective;
- Complies with all federal, state and local laws and Board of Education policies; and
- Encourages outstanding individual and team performance.

The plan provides schedules for teachers, administrative/professional staff, technology and clerical staff, instructional assistants and manual/trade positions. Teacher salaries are based on years of experience and academic degrees earned, and there is additional compensation for longevity with the district. For the other groups of employees, the specific salary is based on the pay grade of the position and the number of days worked per year. For each of these combinations, there are minimum, midpoints and maximum daily rates and annual salaries. The plan also includes a list of stipends, auto allowance rates and substitute employee salary information.

Salary schedules also include board-approved stipends. These are annual or hourly fixed-dollar allotments, and the amount depends upon the classification of the employee. The fiscal 2000-2001 Annual Compensation Plan lists stipends for:

- The Cooperative Teacher Assistant Scholar Program;
- Longevity Stipend I;
- Longevity Stipend II;
- Doctorate Stipend;
- Coaching Stipend;
- Academic Stipend;
- Athletic Worker Stipend; and
- Auto Allowance and Uniform Stipend.

FWISD conducts salary surveys on a regular basis. The most recent survey was completed by the Texas Association of School Boards (TASB) in June 2000. The study reported that when compared to the school district marketplace, FWISD pays generally near average or above average for most jobs. More specifically, findings included:

- Starting pay and salaries for the most experienced teachers (at or above 20 years) are strong and above market;
- Salaries for teachers with three to 15 years of experience at best match the market;
- The district pays at market levels for professional and administrative jobs, but an analysis of other positions (counselors, diagnosticians, librarians, principals, assistant principals and nurses) shows that supervisor positions are consistently 5 percent or more below market;
- FWISD pays above market for clerical, technical and manual trade jobs; and
- Extra duty stipends are below market.

Recommendations of the study include:

- Improving extra-duty stipend pay levels;
- Improving the internal and external pay equity of campus leadership positions;
- Providing a one-time equity adjustment for employees below the proposed range minimums or within range adjustments for teachers; and
- Controlling widening pay gaps among employees at or within similar levels of job responsibility.

FINDING

FWISD provides competitive salaries to its employees. Teaching salaries in FWISD are in line with comparable school districts. As **Exhibit 4-7** illustrates, in 1999-2000, FWISD was in the top half of its peer group in terms of teacher salaries at each level of experience. Among beginning teachers, FWISD salaries were the highest of its peers, even before the district increased beginning teacher salaries to \$35,000 for the 2000-01 school year.

Exhibit 4-7
Average Teacher Salary by Years of Experience
FWISD and Peer Districts
1999-2000

District	Beginning	1 - 5	6 - 10	11 - 20	More than 20
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		years	years	years	years
Fort Worth	\$32,884	\$33,658	\$35,976	\$42,218	\$50,788
Dallas	\$30,627	\$33,309	\$36,185	\$42,043	\$51,447
Austin	\$30,218	\$31,545	\$35,054	\$41,449	\$49,254
El Paso	\$28,547	\$29,996	\$33,324	\$39,218	\$47,196
Houston	\$27,661	\$33,756	\$36,241	\$43,412	\$51,275
State	\$28,588	\$31,013	\$34,632	\$41,191	\$47,140

Source: AEIS, 1999-2000.

FWISD salaries also compare well to neighboring districts. In 1999-2000, the district offered the highest or second-highest salary among all experience levels before increasing salaries for beginning teachers (Exhibit 4-8).

Exhibit 4-8
Average Teacher Salary by Years of Experience
FWISD and Neighbor Districts
1999-2000

District	Beginning	1 - 5 years	6 - 10 years	11 - 20 years	More than 20 years
Fort Worth	\$32,884	\$33,658	\$35,976	\$42,218	\$50,788
Aledo	\$27,583	\$29,625	\$34,589	\$40,821	\$45,747
Arlington	\$30,834	\$32,306	\$35,339	\$42,560	\$50,258
Hurst Euless Bedford	\$32,550	\$33,886	\$35,360	\$42,050	\$50,171
Crowley	\$33,332	\$34,039	\$36,349	\$42,053	\$49,150
Godley	\$25,354	\$28,351	\$34,047	\$41,139	\$42,925
Castleberry	\$28,117	\$29,524	\$33,586	\$39,522	\$44,230
White Settlement	\$27,311	\$29,288	\$33,237	\$39,427	\$44,260
Kennedale	\$27,796	\$30,010	\$34,989	\$41,005	\$45,344
Everman	\$30,839	\$31,941	\$34,280	\$42,073	\$47,381

Source: AEIS, 1999-2000.

Salaries for other professional positions are also among the top half of FWISD's peer districts. Professional support staff in FWISD have the second-highest average salaries, and teachers, school administrators and central administrators have the third-highest salaries (**Exhibit 4-9**).

Exhibit 4-9
Average Salaries
FWISD and Peer Districts
1999-2000

District	Teachers	Professional Support	Campus Administrators	Central Administrators
Fort Worth	\$39,441	\$47,157	\$57,124	\$76,604
Dallas	\$40,306	\$50,051	\$59,809	\$89,117
Austin	\$38,176	\$45,510	\$51,431	\$66,463
El Paso	\$37,391	\$43,728	\$52,992	\$77,035
Houston	\$39,847	\$46,499	\$62,360	\$71,358
State	\$37,567	\$44,698	\$56,226	\$67,463

Source: AEIS, 1999-2000.

As **Exhibit 4-10** shows, FWISD also compares well to its neighboring districts for salaries for most other positions. In 1999-2000, the district offered the second-highest average teacher salary, the second-highest average salary for professional support staff and the third-highest average salary for campus administrators. The district's average salary for central administrators ranked lower among the peers-it was sixth out of 10.

Exhibit 4-10
Average Salaries
FWISD and Neighbor Districts
1999-2000

District	Teachers	Professional Support	Campus Administrators	Central Administrators
Fort Worth	\$39,441	\$47,157	\$57,124	\$76,604
Aledo	\$37,181	\$41,242	\$54,943	\$85,000
Arlington	\$38,691	\$44,943	\$58,977	\$78,485

Hurst Euless Bedford	\$39,676	\$48,136	\$65,772	\$79,319
Crowley	\$38,773	\$43,898	\$54,903	\$86,810
Godley	\$32,665	\$40,289	\$49,800	\$69,000
Castleberry	\$33,972	\$41,923	\$54,069	\$68,235
White Settlement	\$34,505	\$39,914	\$55,354	\$68,049
Kennedale	\$35,861	\$43,548	\$51,672	\$66,848
Everman	\$36,821	\$47,941	\$55,074	\$88,630

Source: AEIS, 1999-2000.

The district's competitive salaries can be attributed to the district's commitment to attracting and retaining qualified employees, periodic salary surveys the district conducts and a staff with solid expertise in compensation. The district provides the standard health benefits (which are described in the Asset and Risk Management chapter of this report), as well as a wide range of employee leave programs, which are summarized in **Exhibit 4-11**.

Exhibit 4-11 Employee Leave Summary

Benefit	Details
Vacation (for 240- or 260-day employees only)	2 weeks per year during first 10 years 3 weeks per year for years 11 through 20 4 weeks per year beginning in the 21st year
Personal Leave	5 days from the state
Sick Leave	5 to 7 days from the district
Additional Sick Leave	For catastrophic illness (handled through the district's sick leave bank)
Bereavement Leave	5 days for the death of an immediate family member 1 day for the death of other family members
Maternity Leave	Employees may use accumulated sick leave, personal leave and vacation days and then are paid at a sub-dock rate for up to six weeks. Either the mother or the father is eligible to receive this benefit. However, if both parents work for the district, only one may utilize this benefit.
Jury Duty	Leave with pay for jury duty from which they cannot be

	excused
Military Leave	A permanent employee who is inducted, enlists or is recalled to active duty...will be granted military leave for the duration of his or her enlistment. The employee must apply for re-employment within 90 days after separation from the service. An employee who is a member of a reserve or National Guard unit will be granted 15 days per year at full pay when ordered to report for training during the school year.
Sabbatical Leave	Sabbatical leave will be granted for certified personnel who have taught no less than seven of the last eight years. The employee will be compensated at a rate that is the difference between his salary and that of the employee who replaced him or her.
Professional/ Business Leave	Certified employees who have been working full-time in the district for no less than seven of the last eight years are entitled to a leave without pay for one year to pursue a field of endeavor outside of public education.
Temporary Disability Leave	Each contract employee will be granted a leave of absence for temporary disability at any time such employee's condition interferes with the performance of regular duties, limited to a period of 18months.
Other Leave	Employees on contract are entitled to a leave without pay for a school year, or for the remainder of a year for personal illness, illness in the immediate family, childcare, study or extensive travel.

Source: FWISD, New Employee Orientation.

In FWISD, of the teachers who left the district during 1999-2000, about 50 percent had been with the district for fewer than three years. As **Exhibit 4-12** shows, of the 639 teachers who left the district between September 1, 1999 and August 31, 2000, 43 (7 percent) had less than a year of experience with the district.

**Exhibit 4-12
Staff and Teacher Turnover
1999-2000**

District	Teachers	All
Less than 1 year	43	122
1 to 2 years	171	271

2 to 3 years	103	166
More than 3 years	322	601
Total leaving	639	1,160

Source: FWISD, *Comprehensive Information Management for Schools System*.

According to survey results, FWISD staff believe turnover is high. As **Exhibit 4-13** shows, when asked to respond to the statement, "Teacher turnover is low," the majority of the staff surveyed disagreed or strongly disagreed (74 percent of teachers, 60.2 percent of principals and assistant principals and 60.5 percent of administrative and support staff).

Exhibit 4-13
"Teacher turnover is low" responses

	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Teachers	3.6%	11.4%	8.3%	41.4%	33.3%	1.9%
Principals and Assistant Principals	3.9%	24.3%	11.7%	43.7%	16.5%	0.0%
Administrative and Support Staff	2.9%	10.3%	24.3%	42.0%	18.5%	2.1%

Source: TSPR survey.

Despite the apparently high turnover in early years and the perceptions of district employees, when compared to peer districts, FWISD's teacher turnover rate is actually lower than the state average and all peer districts except for Dallas ISD (**Exhibit 4-14**).

Exhibit 4-14
Teacher Turnover
1999-2000

District	Teacher Turnover
El Paso	16.5%

Houston	15.9%
Austin	15.9%
Fort Worth	14.0%
Dallas	13.0%
State	15.0%

Source: AEIS 1999-2000.

COMMENDATION

FWISD offers competitive salaries to attract and retain highly qualified staff.

FINDING

Despite a compensation philosophy that states the department will "encourage outstanding individual and team performance," FWISD does not reward exceptional employee performance through financial compensation. Salary increases in FWISD are given to an entire group of employees, so employees receive the same salary increases as their peers regardless of how well they perform individually. When asked whether the district rewards competence and experience, the majority of those surveyed disagreed (**Exhibit 4-15**).

Exhibit 4-15

"The district rewards competence and experience" responses

	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Teachers	3.1%	18.3%	20.5%	37.4%	19.8%	1.0%
Principals and Assistant Principals	1.0%	20.4%	15.5%	45.6%	17.5%	0.0%
Administrative and Support Staff	3.3%	18.9%	14.8%	37.0%	23.5%	2.5%

Source: TSPR survey.

When asked whether teachers are rewarded for superior performance, the majority of principals, assistant principals and administrators surveyed disagreed (**Exhibit 4-16**).

Exhibit 4-16
"Teachers are rewarded for superior performance" responses

	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Teachers	2.4%	9.3%	9.0%	40.7%	37.1%	1.4%
Principals and Assistant Principals	2.9%	24.3%	9.7%	53.4%	8.7%	1.0%
Administrative and Support Staff	2.5%	14.8%	30.9%	34.2%	16.0%	1.6%

Source: TSPR survey.

The district does have a "Chairs for Teaching Excellence Awards" program that rewards exceptional teachers. Under the program, which is funded through contributions by local businesses, honored teachers receive \$10,000 cash stipends. The program is commendable, but since only about 10 teachers are recognized each year, it does not have widespread impact.

It is difficult for a district to encourage outstanding performance when it does not reward it. Other districts have successfully rewarded outstanding employees through pay-for-performance plans.

Spring ISD has a pay-for-performance plan that has received widespread praise and support. The district sets aside a portion of its budget for the performance-based pay plan; this is a separate fund from that set aside for general pay increases. All administrators above assistant principal are required to participate in the plan, which bases pay increases on individual performance against the goals of their individual work plans. These work plans, which include objectives and performance criteria, are developed by the administrator and his or her supervisor. Once the plans are established, supervisors monitor how well administrators perform relative to their goals. Teachers can also participate in the plan.

Pasadena ISD's performance pay plan takes a different approach. The district awards lump sums to campuses achieving ratings of Recognized or Exemplary from TEA based on Texas Assessment of Academic Skills

(TAAS) performance. The amount received by each campus is determined by the rating achieved, the number of employees in various categories and the percentage of economically disadvantaged students. For example, a recognized school receives \$600 per teacher, \$75 per paraprofessional and \$500 per administrative employee. An exemplary school receives \$780 per teacher, \$98 per paraprofessional and \$650 per administrative employee. Schools can then earn an additional \$2,000 to \$6,000 based on the percentage of economically disadvantaged students-the higher the percentage, the higher the bonus. The principal then decides how to distribute the funds among school staff based on input from a performance-pay steering committee. Funds must be used for performance pay for staff assigned to the school during the year upon which the award is based; they cannot be used for instructional supplies, equipment, materials or any other purpose.

In addition, principals in Pasadena ISD are eligible to receive a bonus for achieving recognized or exemplary status. The amount of the bonus increases if the teacher instructs a high percentages of economically disadvantaged students.

Recommendation 34:

Institute a pay-for-performance system to reward exceptional performance.

The FWISD assistant superintendent for Human Resources should lead the effort to research and recommend a pay-for-performance system. A recommendation should be developed with input from School Operations, Finance and individual schools, then presented to the superintendent.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent for Human Resources researches models for pay-for-performance systems.	September 2001
2.	The assistant superintendent for Human Resources convenes a committee to review the options and to develop a recommendation for FWISD.	October 2001
3.	The chief financial officer develops cost estimates associated with each option.	November 2001
4.	The committee presents the recommendation to the superintendent.	December 2001
5.	The system is implemented.	September 2002

FISCAL IMPACT

This recommendation could be implemented with existing resources. The district should reallocate money budgeted for annual increases to the pay-for-performance system.

FINDING

FWISD doubled the salary increase that accompanies some promotions after the (TASB) recommended the action in its June 2000 salary survey. This change was one of the recommendations of the TASB study. Under this new approach, "A preliminary salary will be calculated by increasing the current daily rate of pay (base salary only) by an amount equal to either (1) 10 percent of the daily rate midpoint of the new pay grade if the employee's current daily rate is less than the daily rate midpoint for the new position, or (2) 5 percent of the daily rate midpoint of the new pay grade if the employee's current daily rate is greater than the daily rate midpoint for the new position. The new daily rate will be multiplied by the normal contract days in the new position to arrive at the new preliminary annual salary. This amount will be adjusted downward if the new salary is above the salaries of other employees in the same job with comparable experience." Prior to this TASB recommendation, the increase was 5 percent under both options, whether or not the current daily rate was higher or lower than the daily rate midpoint of the new position. So the increase did not change for individuals whose current daily rate was more than the daily rate midpoint of the new position, but for those with lower current daily rates, this 10 percent is double the previous salary increase. The result is that promotions are going to cost considerably more than they have in the past. The district did not conduct a cost-benefit analysis of the move, and may not be prepared for the increased cost. Most districts evaluate the cost of policy or procedural changes before implementing them.

Recommendation 35:

Evaluate the cost of all procedural and policy changes.

The assistant superintendent of Human Resources should evaluate the cost of this new procedure and of future policy and procedural changes. These costs should be evaluated against the benefits of implementing the change.

In the case of the promotion compensation, the evaluation should include a tabulation of the promotional increases for the past 12 months using both policies. The difference between the two calculations will provide an estimate of the annual cost of the new policy. If the district chose to revert to the previous 5 percent policy, it would not affect those who already

received promotions under the 10 percent policy, but it would be effective for future promotions.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Employee Services and Operations evaluates the specific cost implication of the promotional increase policy and presents this to the assistant superintendent.	July 2001
2.	The assistant superintendent presents it to the board for approval.	August 2001
3.	The assistant superintendent for Human Resources requires cost-benefit analysis for all major policy and procedural changes.	August 2001

FISCAL IMPACT

This recommendation could be implemented with existing resources. The district may receive substantial savings from the evaluation and modification of the policy, or at least could prevent unexpected costs from policy changes.

FINDING

The district is revising its personnel policies, and the Human Resources Department has presented a draft of the revised policies to the board for approval. For the most part, the policies are thorough and complete, but there are a few exceptions. In the draft of the revised policies, there is no mention of promotions or seniority. In addition, some policies, such as recruitment and hiring, cover professional staff thoroughly, but only briefly discuss auxiliary, clerical and paraprofessional staff.

Recommendation 36:

Include policies for promotions and seniority in the policy manual, and ensure that non-professional positions receive sufficient coverage.

The assistant superintendent for Human Resources should review the draft changes to the policy manual and propose additions to address promotions and seniority. In addition, the assistant superintendent should add details to the policies for recruitment and hiring of non-professional staff.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent for Human Resources drafts additions to the policy manual to address these areas.	July 2001
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2.	The assistant superintendent for Human Resources presents the revisions to the board for approval.	August 2001
3.	The board reviews and approves the changes, and the changes are implemented.	August 2001

FISCAL IMPACT

This recommendation could be implemented with existing resources.

FINDING

FWISD pays employees for "moonlighting" but does not have established, written policies governing its moonlighting payroll, nor does the district have processes in place to monitor and control the use of this practice. Moonlighting, as the term applies at FWISD, is extra pay to an employee for district work outside of the employee's regularly scheduled or contracted duties. Usually, moonlighting is based on flat rate for specific activities. Examples of moonlighting pay include: classroom teachers who teach night school or help set up classrooms prior to the start of the school day; off-duty bus drivers who assist with the delivery of warehouse goods to schools; and custodians, and other employees who perform tasks outside of their regularly scheduled job duties.

A review of payroll documentation shows that the amount of moonlighting appears to be excessive, but this cannot be analyzed because the district does not capture and report on this information separately from regular employee pay. The review team looked at payroll binders containing hundreds of pages of moonlighting pay for one pay period. Payroll staff said that moonlighting can be excessive in terms of data entry, review and verification effort. Because each transaction for every employee must be entered separately into the CIMS III payroll system, payroll staff must sometimes work overtime in order to enter all the moonlighting pay. In addition, Payroll Department employees have difficulty planning their processing schedules because the volume of moonlighting transactions can fluctuate from one pay period to the next.

Interviews with the payroll staff at school and department locations also indicate problems with the moonlighting payroll practice. One of the more significant problems indicated by staff include the volume of moonlighting payroll-because there is no official form on which to submit moonlighting payroll, the payroll clerk at each school or department is required to type a list that includes employee name, social security number, budget coding, and moonlighting amount. The verification of moonlighting is also problematic. School staff told the review team that

most moonlighting work is done over weekends, making it difficult to verify whether the tasks were completed.

Because no moonlighting policy exists and moonlighting practices cannot be monitored and analyzed, the district faces the risk of employees abusing the process.

Recommendation 37:

Establish written policies on moonlighting payroll and monitor the time and money spent processing moonlighting pay.

At a minimum, the district should establish written policies and procedures for moonlighting practices. However, a detailed analysis may indicate the need to eliminate or reduce the use of moonlighting.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent for Human Resources develops written policies and procedures for moonlighting.	July 2001
2.	The assistant superintendent for Human Resources and the chief financial officer develop procedures for tracking and monitoring moonlighting payroll practices.	July 2001
3.	The assistant superintendent for Human Resources and the chief financial officer analyze moonlighting practices for three pay periods.	August 2001
4.	The assistant superintendent modifies the moonlighting policy and procedures based on the results of the detailed analysis.	August 2001

FISCAL IMPACT

The implementation of this recommendation could lead to reduced payroll costs, but due to a lack of data this estimate cannot be made at this time.

Chapter 4

PERSONNEL MANAGEMENT

C. Recruiting and Hiring

In a competitive job market, effective recruiting and hiring processes are important priorities for school districts. FWISD's hiring and recruiting are divided among staff based on the type of employee to be hired. The administrator for Professional Recruiting and Staffing oversees recruiting and staffing of teachers and some administrators. The two administrators for Auxiliary Staffing manage the processing of auxiliary staff, and the director of Recruiting and Staffing oversees the hiring of other administrators.

The district fills about 1,500 vacancies each year and experiences the following turnover rates:

• Teachers	14%
• Principals and Assistant Principals	10%
• Instructional Assistants	7%
• Secretaries/Clerks	9%
• Food Service Workers	9%
• Custodians	12%
Bus Drivers	17%

The district has four full-time positions dedicated to teacher recruiting and staffing. These individuals travel around the country visiting colleges, attending job fairs and interviewing students. When they are in Fort Worth, they hold a large job fair in June and mini-fairs later in the summer and fall. Most recruiting for teachers is targeted at hiring people for the start of the school year or the start of second semester.

Auxiliary employees are hired throughout the year. One administrator focuses on teacher assistants, maintenance and custodians. The other administrator focuses on the other auxiliary positions, including secretaries. These offices accept applications throughout the year, and oversee all aspects of the hiring process, including administering pre-employment tests and coordinating criminal background checks.

Principals and supervisors decide who to hire. In general, they receive pre-screened applications for each position from human resources, then they further screen the applications, determine who will be interviewed and identify whom they would like to hire. Those involved in this process-at the schools and in central office-understand the district's desire for a

qualified, diverse staff. Supervisors and managers are encouraged to interview a diverse applicant pool. In addition, a member of the Affirmative Action office participates in interviews and signs off on interview selection forms to ensure that fair hiring practices are followed and that diversity is considered and encouraged. While there is still a significant difference between the percentage of students who are minorities and the percentage of staff who are minorities, FWISD is comparable to its peers.

The School Operations Department handles all applications, screening and interviewing for principals and assistant principals.

As **Exhibit 4-17** illustrates, FWISD has the fourth-highest percentage of minority students and the fourth-highest percent of minority staff, when compared to its peer districts.

**Exhibit 4-17
Diversity of Staff and Students
1999-2000**

District	Percent Minority	
	Staff	Students
Houston	70.7% (1)	90.1% (2)
Dallas	64.3% (2)	91.5% (1)
El Paso	64.1% (3)	83.6% (3)
Fort Worth	49.4% (4)	77.2% (4)
Austin	44.1% (5)	65.3% (5)
State	37.2%	56.9%

Source: AEIS, 1999-2000.

Similar comparisons can be seen in the ethnicities of students and teachers among the peer districts (**Exhibit 4-18**). FWISD has the third-highest percentage of African American teachers and students, and while it has the fourth-highest percentage of Hispanic teachers, it has the lowest percentage of Hispanic students.

**Exhibit 4-18
Diversity of Teachers and Students
1999-2000**

District	African American		Hispanic		White		Asian/Pacific Islander		Native American	
	T	S	T	S	T	S	T	S	T	S
Fort Worth	21.0%	31.7%	12.2%	43.0%	65.5%	22.8%	1.0%	2.3%	0.3%	0.2%
Dallas	40.8%	37.6%	11.9%	52.0%	45.5%	8.5%	1.0%	1.5%	0.7%	0.4%
Austin	7.9%	16.7%	20.8%	45.8%	70.0%	34.8%	1.1%	2.5%	0.2%	0.3%
El Paso	2.8%	4.8%	48.3%	77.3%	48.2%	16.5%	0.5%	1.2%	0.1%	0.3%
Houston	43.1%	33.0%	16.7%	54.1%	38.3%	10.0%	1.8%	2.9%	0.2%	0.1%
State	8.6%	14.4%	16.6%	39.6%	73.9%	43.1%	0.6%	2.6%	0.3%	0.1%

Source: AEIS, 1999-2000.

The district has numerous ongoing recruiting efforts, many targeting individuals from outside FWISD. The district places advertisements in newspapers in other cities and states. Recruiting staff visit colleges and universities in other states for on-campus recruiting, and, when possible, send FWISD teachers who are alumni of these schools to attend the events. The district also holds recruitment days in other cities. These days are advertised in local papers, and interested applicants are invited to attend. The district also invites interested individuals to visit Fort Worth, and for those that are interested, the district coordinates with local employers to assist with job searches for spouses. The district also offers hiring bonuses for teachers in hard-to-fill fields such as bilingual, special education, science or math, and the district posts job openings on its Web page.

During the 1998-99 school year, district staff attended 94 recruiting events. During 1999-2000, they attended about 90 recruiting events, and as of January 2001, district staff had attended or planned to attend 100 recruiting events for the 2000-2001 school year. These events include job fairs, conferences, on-site interviews, newspaper ad interviews and speaking to classes.

This focus on out-of-state recruiting has paid off for the district. During the 1999-2000 school year, the district hired 212 teachers from 37 different states.

FINDING

In December 2000, the district had 23 professional, non-teaching positions that had been vacant for more than one year. **Exhibit 4-19** shows the years during which these positions were vacated.

**Exhibit 4-19
Vacated Positions
December 2000**

Length of Vacancy	Number of Vacancies
1 year	14
2 years	3
3 years	1
4 years	4
5 years	1
Total	23

Source: FWISD, Human Resources Department, List of Vacancies computer printout.

A position that has remained vacant for more than one year is usually an indication that the district has found a way to operate without the position. Assuming the average cost of these positions with benefits is \$40,000, the amount allocated for these vacancies is \$920,000. By showing these budgeted expenditures as salaries, departmental financial information is not accurately reflecting how the \$920,000 is spent.

Budgets can be modified without board approval as long as the expenditure stays within the same department. Departments use funds budgeted for vacant positions to meet other unbudgeted pay increases or other departmental needs. This is inconsistent with the goals of budgeting and misrepresents the intent of department budgets.

School districts that effectively manage their budgets eliminate vacant positions and related budget amounts if the positions are not filled within defined time periods, particularly if there is not an active effort to fill the vacant position.

Recommendation 38:

Implement a policy to eliminate positions not filled within nine months.

The superintendent position and other positions serving on the Executive Committee should be exempt from this policy, since they typically take longer to fill. Implementing this policy will allow the board and senior management to identify actual staffing needs and determine whether resources are available to meet other priorities. The policy should address who is responsible for monitoring the vacancies, the timeframes within which managers should be notified of extended vacancies and approvals needed.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent for Human Resources and the chief financial officer draft a policy for eliminating positions that remain vacant for more than nine months.	July 2001
2.	The assistant superintendent for Human Resources and the chief financial officer present the policy to the board for approval.	August 2001
3.	The board approves the policy.	September 2001

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

In December 2000, the average length of vacancy for the 67 professional, non-teaching positions that had been vacant for less than a year was 107 days. Four of the positions had been vacant for more than 200 days. The lists includes:

- two speech therapists;
- two program directors;
- two librarians;
- four coordinators;
- four assistant principals;
- seven instructional specialists;
- seven directors;
- nine counselors; and
- 11 psychologists.

Several factors contribute to these lengthy vacancies. First, the district's hiring process cycle time is relatively long. It takes an average of four

weeks to fill a position. This includes a two-week posting period, processing and interviewing time. This extended period may cause the district to lose good applicants in a tight labor market. Second, while the district conducts staffing projections for teacher retirement, they do not for other positions. The lack of a formal staff planning process means that non-teaching jobs will remain open a minimum of five to six weeks. Third, the departments may have decided not to fill the positions and have used the funds for other purposes.

When asked whether the district successfully projects staffing needs, more teachers (47 percent) and administrators (44 percent) disagreed than agreed, but 54 percent principals and assistant principals agreed that the district successfully projects district needs (**Exhibit 4-20**).

Exhibit 4-20
"The district successfully projects staffing needs" responses

	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Teachers	2.4%	18.1%	31.7%	31.9%	14.8%	1.2%
Principals and Assistant Principals	3.9%	50.5%	19.4%	21.4%	4.9%	0.0%
Administrative and Support Staff	2.9%	22.2%	29.6%	30.0%	14.4%	.8%

Source: TSPR survey.

Leaving positions vacant for extended periods of time overextends existing staff, reduces departmental efficiency and effectiveness, and may lead to increased consulting costs.

Tools used to maintain these standards include: careful monitoring of the time between notification and job posting, posting and interviewing, and interviewing and hiring. Staff planning involves identifying factors that cause staff to leave, including retirement, and projecting the affect of these factors on the staff.

Recommendation 39:

Reduce the length of vacancies by shortening the hiring cycle and conducting staff planning.

The assistant superintendent for Human Resources should evaluate these extended vacancies and address their causes. The department's hiring process and target timeframes for each step in the process should be reviewed first. Documentation of this process and the timeframes should be distributed to supervisors and principals throughout the district, so that they can ensure their tasks are accomplished appropriately and within designated timeframes. The assistant superintendent for Human Resources should then monitor the results.

The district should also develop a formal staffing model to project openings, especially in jobs with a large number of incumbents and steady turnover such as food service, maintenance and secretarial support.

Hiring timeframes and a formal staff planning process would allow the district to reduce the time needed to fill the positions, reduce the stress on other employees from the additional workload and improve the selection process.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent for Human Resources reviews the hiring process and sets targets for completing the process.	July 2001
2.	The assistant superintendent assigns a team of Human Resources staff members to develop a formal staffing plan for the district. The team should include the administrators for auxiliary staffing.	August 2001

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The district keeps a log of the recruiting trips staff members make, but they do not consistently track the effectiveness or costs of specific recruiting initiatives. The existing log has columns for the date of the event and the type of event, which recruiter attends, the number of candidates and interviews, the ethnicity of the interviewees, whether an alma mater recruiter attended, the cost, and how many letters of intent were given. Unfortunately, it does not include the number of individuals who were hired from each event, and the cost column is not always completed.

While the district is able to use addresses to show which teachers came from which states, they are not able to tie them to particular recruiting

trips. Without tracking the results and costs of each trip, there is no way to measure the efficiency and effectiveness of these efforts.

Recommendation 40:

Track the effectiveness of individual recruiting initiatives.

The director of Recruiting and Staffing should add a column to the log for tracking how many interviewees were hired from each event, and the director should ensure that all columns are completed for each event.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Recruiting and Staffing modifies the log.	July 2001
2.	The team begins using the log	August 2001
3.	The director of Recruiting and Staffing analyzes the results.	Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

As standard practice, the district administers tests required by job advertisements, such as typing tests and language tests, to clerical and auxiliary employees after individuals have been selected for hire.

As a result, the district invests time processing applicants that may not pass the required tests. If the applicant does not pass the test, the department must start over to fill the position.

In well-run human resources departments, these tests are administered earlier in the process.

Recommendation 41:

Administer tests as part of the initial employment screening process.

The district should test applicants as part of the initial screening process. If the applicant does not pass the tests, the application will not need to be processed.

The district should also look into the possibility of moving the testing center to the main building to make testing more efficient.

These steps will save the district time, effort and money during the hiring process.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director for Employee Recruiting and Staffing develops a procedure requiring that applicants be tested earlier in the hiring process.	August 2001
2.	The director of Employee Recruiting and Staffing works with the assistant superintendent to find space in the central office building for on-site employee testing.	September 2001

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 4

PERSONNEL MANAGEMENT

D. Employee Management and Performance Appraisals

There are several departments within the district that participate in employee management activities. In addition to the Human Resources department, there is an Affirmative Action office, a Special Investigations office and an in-house attorney.

The Affirmative Action office has five employees: an ombudsman, three coordinators and a secretary. While the office's responsibilities are broader than personnel issues, from an employee management perspective, the department participates in recruiting efforts and in the interviewing process. They also field employee complaints on topics ranging from sexual harassment to a hostile work environment. Beyond their personnel responsibilities, the department also responds to complaints from the community, including parents and students.

The Special Investigations unit, which is led by the coordinator of Special Investigations, has three full-time investigators, one clerical support position and a part-time investigator. In addition to other responsibilities, the office investigates criminal allegations for and against employees. As soon as a serious allegation is made, the district removes the individual and puts him or her on administrative leave with pay. Examples of serious allegations include, but are not limited to, the following:

- Sexual harassment;
- Misconduct;
- Crimes against children;
- Misuse of property or funds;
- Moral turpitude;
- Theft;
- Fraud;
- Giving false statements; and
- Other felony or misdemeanor crimes.

Between August 14 and November 14, 2000, 37 employees were put on administrative leave with pay for an average of four days each. The district spent \$24,200 in pay for these individuals while they were on administrative leave.

One of the responsibilities of employee management is addressing employee grievances. The employee manual clearly describes the district's commitment to resolving grievances: "It is the District's desire to maintain

open lines of communication between employees and supervisors. You are asked to bring problems to the attention of your supervisor in an attempt to resolve them. In the event that they are not resolved, you may file a grievance per board policy." According to survey results, the district does a satisfactory job resolving these in a fair and timely manner.

As **Exhibit 4-21** illustrates shows that most employees agree that the district has a fair and timely grievance process.

Exhibit 4-21
"The district has a fair and timely grievance process" responses

	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Teachers	3.3%	33.6%	45.2%	12.1%	5.0%	0.7%
Principals and Assistant Principals	6.8%	68.9%	16.5%	4.9%	2.9%	0.0%
Administrative and Support Staff	3.7%	35.8%	35.8%	14.8%	7.0%	2.9%

Source: TSPR survey.

Another key aspect of human resources is performance appraisal. Performance appraisals serve several purposes in any organization. They provide a tool for acknowledging good performance, identifying areas in need of improvement and provide documentation to justify termination decisions.

FWISD conducts annual employee performance appraisals. According to survey results, most employees agree that employees receive annual personnel evaluations (**Exhibit 4-22**).

Exhibit 4-22
"District employees receive annual personnel evaluations" responses

	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Teachers	21.7%	66.0%	7.6%	2.9%	1.0%	1.0%
Principals and Assistant	34.0%	58.3%	4.9%	1.9%	1.0%	0.0%

Principals						
Administrative and Support Staff	14.8%	62.1%	13.6%	6.2%	2.5%	0.8%

Source: TSPR survey.

FINDING

According to the Texas Education Code, Sections 21.105, 21.160, and 21.210, teachers may "relinquish the position and leave the employment of the district at the end of a school year without penalty by filing with the board of trustees or its designee a written resignation not later than the 45th day before the first day of instruction of the following school year." If the teacher resigns later than the 45th day before the first day of instruction, the district has several options. The district can accept the resignation or can choose to notify the State Board for Educator Certification (SBEC), which may in turn impose sanctions against the teacher for not providing sufficient notice. This law applies to teachers on probationary, continuing and term contracts.

With high teacher turnover throughout the state and intense competition for teachers, districts struggle to recruit and retain qualified teachers. This law provides districts with an important tool for encouraging employed teachers to give sufficient notice when resigning to enable districts to fill positions before the start of the school year.

FWISD uses this tool, and holds teachers responsible for the 45-day notice requirement. The district considers each violation of this requirement individually. If the teacher provides a valid reason for leaving or if the district can fill the position easily, they will not involve SBEC. During 1999-2000, about 30 teachers requested release from their contracts after the 45-day limit, and about 15 were granted their release.

COMMENDATION

The district appropriately uses state law to reduce the number of late teacher resignations and ensure positions are filled at the start of the school year.

FINDING

FWISD has increased the workload of personnel staff and has made it more difficult to remove poor performing employees by using two-year term contracts with many professional and administrative positions.

Exhibit 4-23 lists the types of contracts available for several types of positions.

**Exhibit 4-23
Types of Contracts by Position**

Positions (with examples)	Term of Contract(s)
Certified Professional (directors, supervisors, specialists and coordinators of educational programs)	One year probationary, one year term, two year term
Non-certified Professional (program administrators, supervisors, specialists and coordinators of non-instructional programs)	One year probationary, one year term, two year term
Certified Administrator	One year term, two year term
Non-certified administrator	One year term, two year term

Source: FWISD Human Resources department.

Addressing poor staff performance is easier with at-will employees than it is when they are under contract. It is also easier to remove poorly performing staff at the end of a contract than during the contract period.

By signing employees to two-year contracts, FWISD has made it more difficult to remove poorly performing employees. As a result, poor performing employees on contract are less likely to be terminated, and if they are terminated, often are paid their salary until the end of their contract.

TEA requires contracts only for positions that require a certificate or permit. Two-year term contracts are unnecessary.

Recommendation 42:

Issue contracts only for positions requiring certification or permits.

The district should stop issuing contracts for positions that do not require contracts. This would not affect individuals currently on contract.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent for Human Resources drafts a policy	July 2001
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	change eliminating unnecessary two-year contracts.	
2.	The assistant superintendent for Human Resources presents the policy recommendation to the board for approval.	August 2001

FISCAL IMPACT

This recommendation could be implemented with existing resources.

FINDING

There is no standard format for non-teaching performance appraisals. For example, the appraisal form for administrative employees includes three sections. The first provides the opportunity to rate the employee according to nine domains; the second section is for comments; and the third is for recommendations. The nine domains are:

- Instructional management;
- School organizational climate;
- School organizational improvement;
- Personnel management;
- Administration and fiscal/facilities management;
- Student management;
- School/community relations;
- Professional growth and development; and
- Academic excellence indicators/campus performance indicators.

The school operations administrative summary and the central office administrative appraisal forms have two sections. The first rates the employee according to six domains and the second section is for comments. The six domains are:

- Management/leadership;
- Departmental morale;
- Departmental improvement;
- Personnel management;
- District/community relations; and
- Professional growth/development.

The appraisal forms for special education administrators are similar to the school operations and central office administrative appraisals, but instead of personnel management, they rate employees on student services.

The non-instructional supervisor appraisal has two similar sections. The difference is the domains on which they are rated. Non-instructional supervisors are rated on:

- General management;
- Budget management;
- Personnel management;
- Equipment/facilities management;
- Communication;
- School environment;
- School/relations; and
- Professional growth/development.

The domains and format differ even more widely for non-supervisory positions.

By leaving appraisal development to individual departments without human resource expertise, there is a risk that critical elements may be omitted and that elements may not reflect overall district goals. In addition, different formats make forms difficult to maintain, and they make it difficult for the district to evaluate employees consistently.

In an ideal performance appraisal system, Human Resources would determine a set of core elements, such as communication and dedication, against which all employees would be evaluated. A common rating scheme would be used to evaluate individual performance against these elements on all appraisals. A second section could include competencies specific to individual positions. While the competencies would vary by position, the same rating scheme would be used. Finally, the third section would allow space for narrative comments and recommendations.

Recommendation 43:

Standardize format and common elements for performance appraisals of non-teaching staff.

The district should develop a standard format for all performance appraisals. The format should include the common competencies for all positions as well as a section of competencies specific to individual positions. These specific competencies should be tied to the job description for the position and developed cooperatively between employees and their supervisors. They should be reviewed annually as part of the appraisal process.

The standardized format would make appraisal instruments easier to maintain, ensure critical districtwide goals were included and provide consistency among evaluations.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent for Human Resources delegates the responsibility for developing the format for the appraisal form.	August 2001
2.	The draft appraisal form is reviewed and approved by the superintendent and his executive team.	October 2001
3.	The assistant superintendent for Human Resources develops instructions and procedures for the new appraisal system.	November 2001
4.	The assistant superintendent for Human Resources provides training to all supervisors on the new appraisal system.	January 2002 - March 2002
5.	Supervisors begin using the new system.	April 2002

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 4

PERSONNEL MANAGEMENT

E. Professional Development

The district's Professional Development office is led by the assistant superintendent for Professional Development, and it provides a wide range of support, including:

- Leadership Academy for Aspiring Administrators;
- Mini-conferences;
- A summer leadership academy;
- Principal mentor/ new principal program;
- Teacher leaders program;
- College collaborations for Master's degree in administration;
- Site-based decision-making (compliance portion);
- Professional Development and Appraisal System (PDAS);
- Diversity Training and Implementation;
- Substitute Teachers Academy;
- Special training for secretaries;
- Collaboration with other departments to provide training for auxiliary staff;
- Supervision of district-wide tutoring program;
- Professional development for teachers and administrators in content/ program areas (Pathways to Excellence);
- Training related to district initiatives for teachers and administrators; and
- Training for implementation of new textbooks, TAAS, Texas Essential Knowledge and Skills, etc.

These activities also support auxiliary staff.

FINDING

During the 1999-2000 school year, the district required custodians who did not have a high school diplomas or a GED to take GED classes and the GED test. The intent of the program is to attract and retain custodians, while helping them obtain their GED, which is a requirement for becoming a head custodian.

The classes are free, and the district pays for the tests. Custodians have three years to obtain their GED. If they do not obtain it during this time, but they can show they have been attending classes, the time period is extended. In the year the program has been in place, eight custodians have

completed the class work and have passed their GED test. There are another 50 to 55 custodians in the program.

COMMENDATION

The district has an innovative program to help custodians receive their GEDs.

FINDING

The district provides effective training for principals, including the Leadership Academy for Aspiring Administrators, the New Principal Program and Leadership Academy mini-conferences. The Leadership Academy is a two-year program designed to prepare people with mid-management certification to become assistant principals. Classes are held two evenings a month during the first year. Individuals who do not assume administrative positions after the first year may continue with the second year of the Academy. The program is based on SBEC Standards for Principalship, and includes sessions on:

- Leadership expectations for site administrators;
- Special investigation issues;
- Board policy issues;
- Site-based decision-making;
- Monitoring the instructional program;
- Addressing special education issues;
- Advanced academic services;
- Supporting the instructional program through the budgeting process; and
- Utilizing central services.

The New Principal Program assigns principal mentors to all new principals.

Finally, the district offers mini-conferences for principals, assistant principals, academic coordinators and aspiring administrators. These mini-conferences focus on a variety of topics. Each individual is invited to select one topic and attend mini-conferences on that topic throughout the school year. During 2000-01 these topics included:

- Facilitative leadership;
- Target: the secondary principalship of 2001;
- Target: the elementary principalship of 2001;
- The business of school;
- Best practices;
- Seven habits of highly effective people;

- All children are special; and
- Use of student assessment data to improve instruction.

During the 2000-01 school year, each conference group is scheduled to meet seven times.

When asked whether the district operates an effective staff development program, almost 73 percent of principals agreed (**Exhibit 4-24**).

Exhibit 4-24
"The district operates an effective staff development program"
responses

	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Principals and Assistant Principals	13.6%	59.2%	5.8%	15.5%	5.8%	0.0%

Source: TSPR survey.

COMMENDATION

The district provides exceptional training to its principals.

FINDING

Unlike principals, FWISD's non-instructional supervisors receive minimal training. While they receive some job-specific training from their respective departments, they do not receive training on districtwide management topics. For example, they do not receive training on the hiring process, how employees will be paid, human resources policies and procedures, the budget process, performance reporting and performance evaluations. Training supervisors would also improve the efficiency and effectiveness of the district's decentralized hiring process for auxiliary staff.

These types of training are critical to operating an effective department and district. Without standardized training for these topics, there will continue to be a lack of understanding of district operations and procedures, and efficiency and effectiveness will suffer.

Recommendation 44:

Provide mini-conferences to non-instructional supervisory personnel.

Using the model established for the Leadership Academy mini-conferences, the district should develop mini-conferences for non-instructional supervisors. Possible topics could include human resource policies and procedures, budgeting and performance reporting.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent for Professional Development determines the specific training needs for various supervisors.	August 2001
2.	The assistant superintendent for Professional Development assigns appropriate individuals in appropriate departments the responsibility for developing the training sessions.	September 2001 - December 2001
3.	The assistant superintendent for Professional Development notifies employees of training opportunities and enrolls supervisors.	January 2002

FISCAL IMPACT

Training would be delivered in-house by district employees who are experts in the various areas covered. Supplies for the mini-conferences would cost about \$5,000 a year.

Recommendation	2001-2002	2002-03	2003-04	2004-05	2005-06
Provide mini-conferences to non-instructional supervisory personnel.	(\$5,000)	(\$5,000)	(\$5,000)	(\$5,000)	(\$5,000)

Chapter 5

FACILITIES USE AND MANAGEMENT

This chapter reviews the Fort Worth Independent School District's (FWISD's) facilities use and management function in four sections:

- A. Facilities Planning, Design and Construction Management
- B. Plant Maintenance
- C. Custodial Services
- D. Energy Use and Management

A comprehensive facilities planning department, including maintenance, housekeeping and energy management, should effectively coordinate all physical resources in the district. The objective of this program is to provide a safe and clean environment for students and to integrate facilities planning with other aspects of school planning. Moreover, facilities personnel should be involved in design and construction activities and be knowledgeable about operations and maintenance activities. Finally, facilities departments should operate under clearly defined policies and procedures that can be adapted to changes in the district's resources and needs.

BACKGROUND

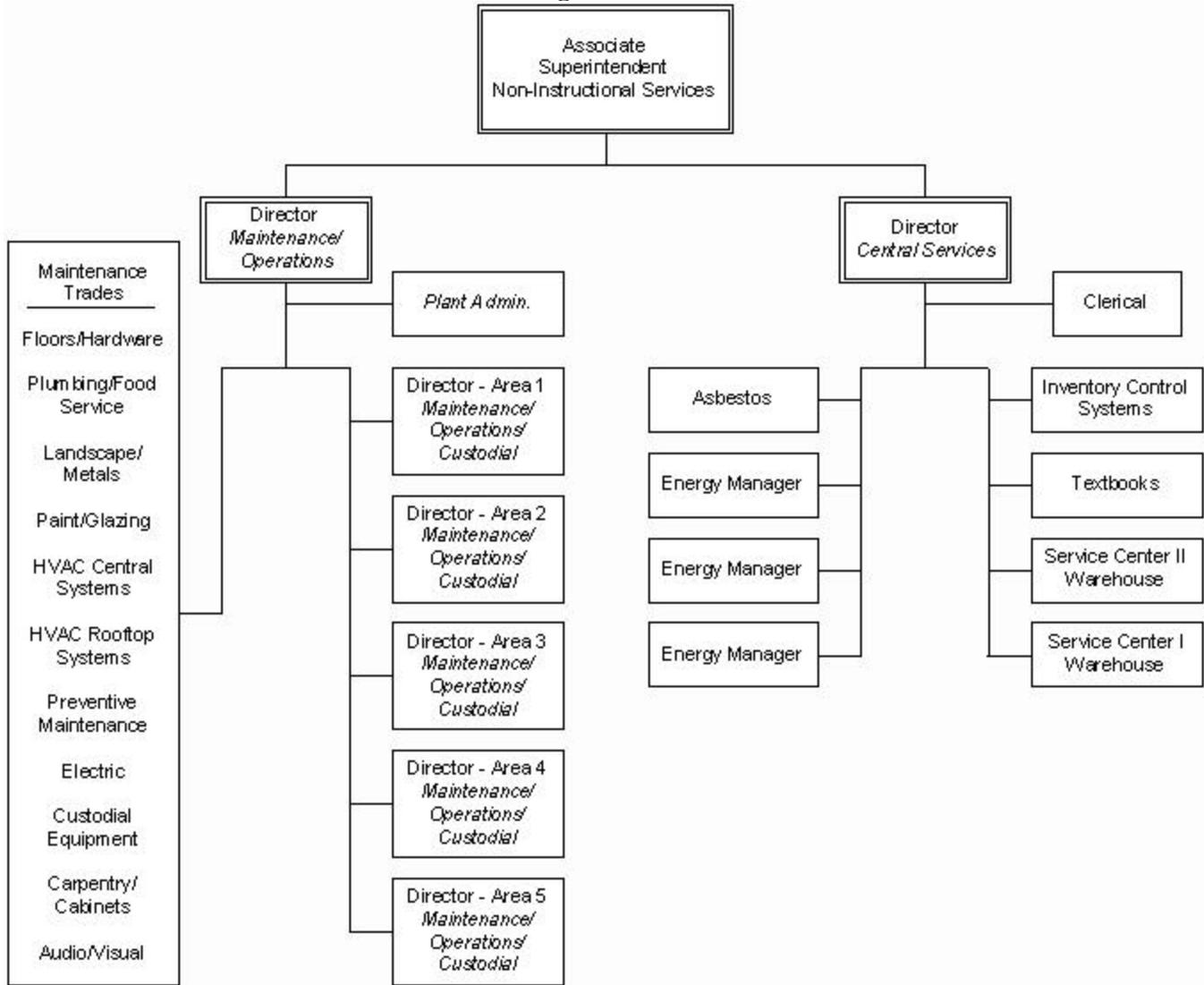
FWISD is the ninth fastest-growing big city school district in the United States, adding 1,000 new students each year. Twenty percent of its students are educated in portable buildings and the district's schools are an average of 46 years old. The 1985 bond election funded nine new elementary schools, built additions at 49 others, and made numerous other improvements. Student enrollment has grown by 13,500 students since then.

FWISD's facilities management functions are under the responsibility of the associate superintendent of Non-Instructional Services. The director of Maintenance and Operations reports directly to the associate superintendent, and is responsible for all maintenance trades and custodial services. The director of Central Services oversees energy management, as well as inventory control and warehousing. **Exhibit 5-1** presents the organizational structure of the district's facilities management function.

Exhibit 5-1

FWISD Facilities Planning, Design and Construction Management

Organization



Source: FWISD Organizational Chart, updated January 16, 2001.

Chapter 5

FACILITIES USE AND MANAGEMENT

A. Facilities Planning, Design and Construction Management (Part 1)

The mission of an effective facilities planning, design and construction management function is to plan for and provide facilities that meet the needs of students at the lowest possible cost. The specific goals of a Facilities Planning, Design and Construction Management department are:

- To establish a policy and framework for long-range facilities planning;
- To provide valid enrollment projections on which to base estimates of future needs for sites and facilities;
- To select and acquire proper school sites and to time their acquisition to precede actual need while avoiding wasted space;
- To determine the student capacity and educational adequacy of existing facilities and to evaluate alternatives to new construction;
- To develop educational program specifications from which the architect can design a functional facility that matches the needs of the curriculum while enhancing and reinforcing student education;
- To secure architectural services to assist in planning and constructing facilities;
- To develop a capital planning budget that balances facility needs, expenditures necessary to meet those needs, and how expenditures will be financed;
- To translate satisfactorily the approved architectural plans into a quality school building and to do so within the budget and time scheduled; and
- To establish and carry out an orientation program so that users of the facility can better understand the design rationale and become familiar with the way the building is supposed to work.

Facilities planning, design and construction management at FWISD is the responsibility of the associate superintendent for Non-Instructional Services. **Exhibit 5-2** presents the size, date constructed and dates of major additions of FWISD academic facilities.

Exhibit 5-2
FWISD Facilities Size and Age

School Name	Total Gross S.F.	Site Size (Acres)	Date Constructed	Major Additions
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High Schools				
Amon Carter-Riverside	89,871	18.2	1935	1954, '56, '79, '89
Arlington Heights	181,382	31.7	1936	1949, '54, '58, '80, '88, '89
South Hills	120,501	27.7	1969	1973, '79, '88, '89, '90
Diamond Hill-Jarvis	91,430	21.0	1951	1979, '88, '89
Dunbar	178,809	13.8	1967	1980, '82, '88, '89
Eastern Hills	188,333	20.0	1957	10970, '79, '89
North Side	126,540	32.4	1936	1953, '66, '79, '89
Polytechnic	130,703	18.6	1936	1954, '66, '70, '79, '89
Paschal	235,440	24.6	1936	1954, '58, '79, '89
Trimble Technical	217,451	11.0	1918	1954, '66, '73, '79
Southwest	200,567	65.6	1967	1979, '88
Western Hills	161,576	33.0	1969	1979, '89
O. D. Wyatt	201,489	30.0	1968	1972, '80, '89
Accelerated	47,806	9.2	1922	1956
Metro Opportunity	19,350	2.0	1935	
Subtotals	2,191,248			
Middle Schools				
Middle Level Learning Center	23,848	2.6	1954	
Horizons Alternative School	21,638	Storefront		
Daggett	62,530	7.6	1954	
Wedgewood Sixth Grade	33,516	7.6		
Elder	157,391	14.9	1918	

Forest Oak	99,322	15.5	1953	
Dunbar Sixth Grade	65,100	10.0	1952	
Handley	73,008	20.0	1982	
William James	124,260	8.0	1926	
Kirkpatrick	63,900	5.75	1949	
McLean	96,966	15.2	1953	
Meacham	88,574	20.0	1960	
Meadowbrook	69,909	11.0	1953	
Monnig	79,855	7.0	1951	
Morningside	80,866	13.2	1954	
Riverside	86,070	12.2	1949	
Rosemont	105,467	20.5	1935	
Stripling	102,434	7.7	1926	
Dunbar	92,284	25.3	1982	
Wedgewood	107,452	12.0	1960	
Leonard	120,470	15.0	1967	
Glencrest	35,650	6.0	1953	
Subtotals	1,790,510			
Elementary Schools				
Benbrook	43,168	8.5	1953	1970, '78, '88
I M Terrell	46,788	8.46	1936	1998
West Handley	29,500	5.0	1954	1995, '97
Burton Hill	56,873	12.0	1958	1988, '89
Carroll Peak	46,594	5.1	1989	
Carter Park	43,729	6.0	1957	1978
Manuel Jara	56,100	7.0	1988	
George C. Clark	54,050	4.3	1914	1934, '48, '53, '89
I. ilv B.	41,187	7.3	1923	1936, '89

Clayton				
Como	49,176	3.0	1954	1959, '89
E M Daggett	89,314	5.9	1926	
Rufino Mendoza	54,098	3.9	1910	1935, '79, '89
De Zavala	55,158	4.27	1914	1957, '89, '90
Diamond Hill	48,940	5.8	1988	
S S Dillow	61,590	8.0	1937	1989, '90
Maude I Logan	57,696	7.3	1957	1989
Eastern Hills	49,109	11.9	1958	1960, '78, '88
East Handley	35,739	8.2	1958	1978
Eastland	52,719	5.5	1957	1989, '90
Harlean Beal	39,925	4.0	1948	1978, '90
Glen Park	51,907	6.4	1953	1957, '78, '90
W M Green	46,583	6.0	1959	1978, '89
Greenbriar	47,391	6.0	1958	1978
Van Zandt- Guinn	40,488	4.9	1980	1989
Hubbard Heights	26,907	8.0	1922	1934, '52, '57, '89
H B Helbing	45,576	3.7	1947	1954, '57, '89
Milton L Kirkpatrick	47,314	5.0	1958	
Meadowbrook	66,616	15.0	1935	
D McRae	48,000	5.2	1990	
Mitchell Boulevard	52,230	6.0	1953	1988, '89
M H Moore	58,840	6.0	1956	
Morningside	69,450	9.8	1934	1989, '90
Charles E Nash	28,250	4.5	1927	
North Hi Mount	40,295	5.0	1934	1948, '88

Oakhurst	71,662	7.7	1927	1936, '47, '49, '89, '90, '92
Natha Howell	43,075	6.3	1948	1958, '78, '90
Oaklawn	41,840	5.9	1935	1950, '52, '59, '78, '90
A M Pate	62,033	8.0	1959	
Mary Louise Phillips	42,393	7.2	1948	1952, '57, '78, '88
Ridglea Hills	42,950	8.0	1958	1978
Luella Merrett	42,240	7.0	1949	1989
Versia L Williams	37,490	2.7	1955	1957, '88, '89
Marjorie M Walton	52,095	7.9	1958	1989
Sam Rosen	52,122	4.1	1926	1988
Sagamore Hill	28,103	5.0	1940	1949, '52, '57, '97
Bruce Shulkey	49,134	5.9	1958	1960, '78
R J Wilson	45,409	3.1	1913	1952, '89, '90
South Hi Mount	45,264	7.0	1936	1949, '78
South Hills	52,848	5.7	1953	1956, '78
Springdale	35,775	4.1	1953	1978
Sunrise	42,548	6.0	1958	1988, '89
Tanglewood	37,817	6.0	1960	1989
W J Turner	54,123	4.1	1949	1957, '78
Washington Heights	33,187	4.0	1979	
Waverly Park	49,234	6.8	1959	1965, '78
Westcliff	48,401	5.1	1953	1956, '88, '89
Westcreek	58,914	6.0	1965	1978
Western Hills	44,138	10.3	1968	1978, '88
Worth Heights	57,350	7.2	1955	1957, '88, '89
David K Sellars	57,247	9.3	1966	1978, '90

J T Stevens	58,002	8.0	1967	1978
Atwood McDonald	43,772	6.3	1967	1978
Bill Elliott	48,000	10.0	1988	
Westpark	46,594	33.0	1988	
T A Sims	62,400	8.0	1989	
Edward J Briscoe	50,174	17.1	1988	
Woodway	46,594	10.0	1990	
Subtotals	3,264,228			
Grand Total	7,245,986			

Source: Fort Worth ISD Campus Data Analysis - By Campus Number, 10/20/98 and FWISD Buildings Inventory, 9/11/00.

FWISD, like the state's other major urban school districts, is faced with the ongoing challenge to provide adequate facilities for its growing student enrollment. The district is adding 1,000 new students per year and is educating twenty percent of its students in portable buildings. In addition, the district has added approximately 13,500 students since its last bond program passed in 1985.

In 1998 FWISD hired Total Project Management, Inc. (TPM) to assist the district in assessing its facilities in preparation for a bond program to provide funds for new schools, classroom additions and other facilities. TPM, working with personnel from the district, evaluated each school in terms of its physical condition and developed computer-assisted design (CAD) floor plans and site plans of each school. The site-based management team from each school was given a list of potential facility improvements such as new classrooms, new athletic facilities, new science facilities, heating, ventilation and air conditioning (HVAC) upgrades, and new roofs and was asked to rank in order of priority what they felt were the most pressing needs at each school. This process with the site-based management team resulted in the generation of a "wish list". The district also hired a consultant in 1998 to develop enrollment projections.

The resulting bond package developed by the FWISD board of trustees attempts to arrive at a solution for each campus that addresses facility condition, enrollment projections and the most essential components of each site-based management team's "wish list". As part of the

development of the bond package to be presented to district voters, a schematic site plan and floor plan were developed for each school showing where new additions would be located and what areas were to be renovated.

In February 1999, FWISD voters passed a bond program worth \$398 million. The program included renovations and/or additions to 110 existing schools, 12 new elementary schools, 4 new sixth grade centers as well as various heating, ventilating and air conditioning (HVAC), technology and accessibility upgrades. **Exhibit 5-3** shows the program breakdowns for the bond projects. The bond projects will be accomplished in four phases and are scheduled to be completed in 2004.

**Exhibit 5-3
FWISD Bond Project Breakdown**

Program Element	Amount
High Schools	\$62,360,245
Middle Schools	\$41,802,321
Sixth Grade Centers	\$8,946,667
Elementary Schools	\$86,450,628
New Elementary Schools	\$112,051,956
Special Campuses	\$1,865,003
Technology	\$21,980,000
ADA Compliance	\$21,980,000
A/C Kitchens & Gyms	\$10,990,000
Survey and Plats	\$1,000,000
Land Acquisition	\$4,000,000
Furniture, Fixtures & Equipment	\$10,990,000
Asbestos	\$12,089,000
Contingency	\$1,494,180
Total	\$398,000,000

Source: FWISD 1999 Bond Program Proposal.

Exhibit 5-4 shows the sequence of each project.

**Exhibit 5-4
FWISD Bond Project Sequence**

Phase I/IA	Phase II	Phase III	Phase IV
High Schools			
Arlington Heights	Amon Carter-Riverside	Southwest HS	Arlington Heights
Diamond Hill-Jarvis	Eastern Hills		Metro Opportunity
Dunbar	Polytechnic		
North Side	Western Hills		
Paschal			
South Hills			
Southwest			
Trimble Technical			
O D Wyatt			
Middle Schools			
Dunbar	Glencrest	Dunbar Sixth Grade	Daggett
Handley	Leonard	Elder MS	Horizons Alternative
Meadowbrook	Meacham	Forest Oak	Rosemont
Riverside	Morningside	Kirkpatrick	
William James		McLean	
Wedgewood Sixth Grade		Monnig	
4 New Sixth Grade Centers		Stripling	
		Wedgewood	
Elementary Schools			
Carter Park	Benbrook	Alice Carlson ALC	E.J. Briscoe
Greenbriar	George Clark	Como Montessori	Burton Hill
Hubbard Heights	Lily B. Clayton	De Zavala	Como
Luella Merret	E.M. Daggett	Eastern Hills	Rufino Mendoza, Sr.

M.L. Phillips	Diamond Hill	M.H. Moore	S.S. Dillow
Sagamore Hill	Eastland	A.M. Pate	East Handley
Tanglewood	Glen Park	Sam Rosen	Bill Elliott
Richard J. Wilson	W.M. Green	D.K. Sellars	Natha Howell
Woodway	H.V. Helbing	South Hills	Manuel Jara
	Maude Logan	South Hi Mount	M.L. Kirkpatrick
	Meadowbrook	Springdale	Atwood McDonald
	D. McRae	Sunrise	Mitchell Boulevard
	Oakhurst	Maudrie Walton	Morningside
	Oaklawn	Waverly Park	Charles Nash
	Ridgelea Hills	Westcliff	North Hi Mount
	Bruce Shulkey	Westcreek	Carroll Peak
	W.J. Turner	West Handley	Riverside ALC
	Van Zandt-Guinn		T.A. Sims
	Washington Heights		J.T. Stevens
	Worth Heights		I.M. Terrell
			Versia Williams
			Western Hills
			Westpark
New elementaries serving: Harlean Beal George Clark/Westcliff Eastern Hills/Bill Elliott Greenbriar/Hubbard/Richard Wilson/Sam Rosen/Manuel Jara/W.J. Turner Western Hills attendance areas	New elementaries serving: Daggett/De Zavala/Nash Glen Park/Carter Park Manuel Jara/Rufino Mendoza Springdale/Oakhurst attendance areas		New elementaries serving: M.H. Moore M.L. Phillips/Ridgelea Hills attendance areas

Source: FWISD Web site www.fortworthisd.org/bond/pro_sequence.html .

Currently, the bond projects are in Phase I/IA. On October 24, 2000 the financial status of the bond projects were presented as shown in **Exhibit 5-5**. These figures reflect the budgets that were established in the bond planning process.

**Exhibit 5-5
FWISD Bond Program Financial Status**

Source of Funds	Amount
Bond Proceeds - Phase I	\$90,000,000
Bond Proceeds - Phase IA	\$132,000,000
Transfer in From Food Service Fund	\$3,300,000
Investment Earnings to Date	\$8,573,655
Total Sources of Funding	\$233,873,655
Budgeted Use of Funds	(\$228,847,155)
Estimated Contingency	\$5,026,500

Source: FWISD Bond Program Status as of August 31, 2000.

One of the goals of the bond program was to drastically reduce the use of portable classrooms within the district and replace the enrollment capacity of the portable classrooms with permanent construction. Prior to the passage of the bond, the district estimated that 20 percent of the student population was housed in portable classrooms. The goal of the bond program was to reduce the number of students housed in portable classrooms to less than 4 percent.

Exhibits 5-6, 5-7 and 5-8 contain data on permanent and portable classrooms in FWISD before and after the bond projects.

**Exhibit 5-6
FWISD High School Instructional Space Analysis**

School Name	Pre-Bond		Post-Bond			
	Permanent Classrooms or Instructional Spaces	Portable Classrooms	Permanent Classrooms or Instructional Spaces	Portable Classrooms	Permanent Classrooms Added (Subtracted)	Portable Classrooms Added (Subtracted)
Amon	37	9	41	0	4	(9)

Carter-Riverside						
Arlington Heights	65	1	71	0	6	(1)
South Hills	42	2	76	0	34	(2)
Diamond Hill-Jarvis	30	8	44	0	14	(8)
Dunbar	60	2	67	2	7	0
Eastern Hills	63	2	65	2	2	0
North Side	39	31	65	0	26	(31)
Polytechnic	54	0	60	0	6	0
Paschal	81	32	94	32	13	0
Trimble Technical	90	0	97	0	7	0
Southwest	73	8	73	8	0	0
Western Hills	67	4	67	4	0	0
O D Wyatt	57	9	82	0	25	(9)
Accelerated	19	6	21	6	2	0
Metro Opportunity	12	4	12	4	0	0
Totals	789	118	935	58	146	(60)

Source: FWISD Campus Data Analysis - By Campus Number, 10/20/98 and breakdown of bond work at each school provided by FWISD Facilities Department.

**Exhibit 5-7
FWISD Middle School Instructional Space Analysis**

	Pre-Bond		Post-Bond			
School Name	Permanent Classrooms	Portable Classrooms	Permanent Classrooms	Portable Classrooms	Permanent Classrooms	Portable Classrooms

	or Instruct. Spaces		or Instruct. Spaces		Added (Subtracted)	Added (Subtracted)
Middle Level Learning Center	12	1	12	1	0	0
Horizons Alternative School	12	0	12	0	0	0
Daggett	27	10	37	0	10	(10)
Wedgewood Sixth Grade	16	11	28	0	12	(11)
Elder	51	0	51	0	0	0
Forest Oak	33	24	33	24	0	0
Dunbar Sixth Grade	24	0	24	0	0	0
Handley	24	6	24	0	0	(6)
William James	49	7	56	7	7	0
Kirkpatrick	26	2	26	2	0	0
McLean	38	8	42	0	4	(8)
Meacham	34	10	41	0	7	(10)
Meadowbrook	30	16	52	0	22	(16)
Monnig	35	12	41	0	6	(12)
Morningside	34	5	41	0	7	(5)
Riverside	37	5	45	0	8	(5)
Rosemont	47	24	51	0	4	(24)
Stripling	38	0	38	0	0	0
Dunbar	42	4	50	0	8	(4)
Wedgewood	42	2	42	2	0	0
Leonard	50	12	50	12	0	0
Glencrest	16	7	26	0	10	(7)
Totals	717	166	822	48	105	(118)

*Source: FWISD Campus Data Analysis - By Campus Number, 10/20/98
and breakdown of bond work at each school provided by FWISD
Facilities Department.*

Chapter 5

FACILITIES USE AND MANAGEMENT

A. Facilities Planning, Design and Construction Management (Part 2)

Exhibit 5-8
FWISD Elementary Schools Classroom Analysis

School Name	Pre-Bond		Post-Bond			
	Permanent Classrooms or Instruct. Spaces	Portable Classrooms	Permanent Classrooms or Instruct. Spaces	Portable Classrooms	Permanent Classrooms Added (Subtracted)	Portable Classrooms Added (Subtracted)
Benbrook	24	10	33	0	9	(10)
I. M. Terrell	19	0	19	0	0	0
West Handley	12	10	22	0	10	(10)
Burton Hill	25	0	25	0	0	0
Carroll Peak	29	0	29	0	0	0
Carter Park	18	22	30	0	12	(22)
Manuel Jara	34	10	34	10	0	0
George C. Clark	24	16	24	0	0	(16)
Lily B. Clayton	14	16	28	16	14	0
Como	26	0	26	0	0	0
E. M. Daggett	44	0	47	0	3	0
Rufino Mendoza	34	6	34	6	0	0
De Zavala	22	2	22	2	0	0
Diamond Hill	30	6	37	6	7	0
S. S. Dillow	30	1	30	1	0	0
Maude I Logan	30	3	34	0	4	(3)
Eastern Hills	34	10	44	0	10	(10)

East Handley	15	9	24	9	9	0
Eastland	27	6	33	6	6	0
Harlean Beal	17	4	24	0	7	(4)
Glen Park	27	14	33	0	6	(14)
W. M. Green	36	6	40	0	4	(6)
Greenbriar	22	18	30	0	8	(18)
Van Zandt-Guinn	18	0	18	0	0	0
Hubbard Heights	22	22	36	0	14	(22)
H. B. Helbing	30	2	32	2	2	0
Milton L Kirkpatrick	17	6	17	4	0	(2)
Meadowbrook	25	6	33	6	8	0
D. McRae	27	4	31	0	4	(4)
Mitchell Boulevard	25	0	25	0	0	0
M H Moore	31	13	31	13	0	0
Morningside	34	0	34	0	0	0
Charles E Nash	11	5	11	5	0	0
North Hi Mount	16	5	16	5	0	0
Oakhurst	31	10	39	0	8	(10)
Natha Howell	24	6	24	6	0	0
Oaklawn	20	6	33	0	13	(6)
A. M. Pate	25	4	25	4	0	0
Mary Louise Phillips	20	14	32	0	12	(14)
Ridglea Hills	20	11	32	0	12	(11)
Luella Merrett	19	16	34	0	15	(16)
Versia L Williams	25	1	25	1	0	0

Marjorie M Walton	29	0	29	0	0	0
Sam Rosen	29	13	29	0	0	(13)
Sagamore Hill	19	21	31	0	12	(21)
Bruce Shulkey	24	12	36	12	12	0
R. J. Wilson	22	16	34	0	12	(16)
South Hi Mount	19	10	29	10	10	0
South Hills	23	8	23	0	0	(8)
Springdale	17	9	27	0	10	(9)
Sunrise	24	2	28	0	4	(2)
Tanglewood	11	14	30	0	19	(14)
W. J. Turner	25	21	32	0	7	(21)
Washington Heights	12	6	12	6	0	0
Waverly Park	25	7	25	7	0	0
Westcliff	21	10	21	0	0	(10)
Westcreek	31	8	38	0	7	(8)
Western Hills	24	20	24	20	0	0
Worth Heights	32	10	42	0	10	(10)
David K. Sellars	27	2	27	2	0	0
J. T. Stevens	27	4	28	4	1	0
Atwood McDonald	18	6	18	6	0	0
Bill Elliott	30	6	30	6	0	0
Westpark	24	0	24	0	0	0
T A Sims	37	4	37	4	0	0
Edward J Briscoe	30	0	30	0	0	0
Woodway	25	7	36	0	11	(7)

Totals	1,638	516	1,950	179	312	(337)
12 New Elementary Schools with 28 Classrooms each = 336 Classrooms Total			336	0	336	0
Totals			2,286	179	648	(337)

Source: FWISD Campus Data Analysis - By Campus Number, 10/20/98 and breakdown of bond work at each school provided by FWISD Facilities Department.

These exhibits show that through the bond projects the district will reduce the use of portable classrooms 51 percent at the high schools, 71 percent at the middle schools and 66 percent at the elementary schools. After completion of the bond projects, the district will have added 899 new permanent classrooms while at the same time reducing the number of portable classrooms by 515.

One of the major factors that went into the district's bond project planning was the accommodation of increases in projected student enrollment. Many schools are scheduled to receive additions and four new sixth grade centers are planned, as well as twelve new elementary schools to house the projected increase in student population. Additionally, these additions and new schools will move the district toward its goal of greatly reducing the percentage of students housed in portable buildings.

Exhibits 5-9, 5-10 and 5-11 analyze the student capacity of each school both before and after the bond projects. Since the enrollment projections used for bond planning purposes project out to the year 2007, the analysis of capacity after the bond projects is based on the 2006-2007 projections even though the bond projects are scheduled to be completed by the end of 2004.

**Exhibit 5-9
FWISD High Schools Capacity Analysis**

	Pre-Bond	Post-Bond
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School Name	Permanent Capacity based on Number of Instruction Spaces	Overall Capacity including Portables	Current Enrollment	(Over)/ Under Capacity	Permanent Capacity based on Number of Instruction Spaces	Overall Capacity including Portables	2006-07 Enrollment	(Over)/ Under Capacity
Amon Carter-Riverside	786	978	700	278	871	871	687	184
Arlington Heights	1,381	1,403	1,457	(55)	1,509	1,509	1235	274
South Hills	893	935	801	134	1,615	1,615	850	765
Diamond Hill-Jarvis	638	808	756	52	935	935	897	38
Dunbar	1,275	1,318	1,203	115	1,424	1,466	1075	391
Eastern Hills	1,339	1,381	1,321	60	1,381	1,424	1160	264
North Side	829	1,488	1,580	(93)	1,381	1,381	2266	(885)
Polytechnic	1,148	1,148	1,016	132	1,275	1,275	1087	188
Paschal	1,721	2,401	2,090	311	1,998	2,678	2503	175
Trimble Technical	1,913	1,913	1,274	639	2,061	2,061	1160	901
Southwest	1,551	1,721	1,486	235	1,551	1,721	2417	(696)
Western Hills	1,424	1,509	1,386	123	1,424	1,509	1298	211
O D Wyatt	1,211	1,403	1,395	8	1,743	1,743	2067	(325)
Accelerated	404	531	166	365	446	574	200	374
Metro Opportunity	255	340	143	197	255	340	354	(14)
Totals	16,766		16,774	2,500	19,869		19,256	1,845

Note: Capacities are based on 25 students per instructional space x a utilization factor of 85 percent.

Source: FWISD Campus Data Analysis - By Campus Number, 10/20/98

and FWISD Elementary, Middle and High School Enrollments and Projections prepared by Dr. Paul Geisel, February 9,1998.

While there are several high schools in 2006-2007 that exceed student capacity, there is sufficient capacity in the high schools in general. It is assumed that attendance zones will be revised as necessary to move students from schools that exceed capacity to schools that are under-used.

**Exhibit 5-10
FWISD Middle Schools Capacity Analysis**

School Name	Pre-Bond				Post-Bond			
	Permanent Capacity based on Number of Instruction Spaces	Overall Capacity including Portables	Current Enrollment	(Over)/ Under Capacity	Permanent Capacity based on Number of Instruction Spaces	Overall Capacity including Portables	2006-07 Enrollment	(Over)/ Under Capacity
Middle Level Learning Center	255	276	95	181	255	276	235	41
Horizons Alternative School	255	255	101	154	255	255	81	174
Daggett	574	786	649	137	786	786	1439	(653)
Wedgewood Sixth Grade	340	574	530	44	595	595	529	66
Elder	1,084	1,084	1,125	(41)	1,084	1,084	1621	(537)
Forest Oak	701	1,211	766	445	701	1,211	847	364
Dunbar Sixth Grade	510	510	290	220	510	510	261	249
Handley	510	638	715	(78)	510	510	646	(136)
William James	1,041	1,190	1,049	141	1,190	1,339	1428	(89)
Kirkpatrick	553	595	511	84	553	595	697	(102)
McLean	808	978	919	59	893	893	1290	(398)
Meacham	723	935	770	165	871	871	998	(127)
Meadowbrook	638	978	967	11	1,105	1,105	1389	(284)

Monnig	744	999	745	254	871	871	1204	(333)
Morningside	723	829	662	167	871	871	623	248
Riverside	786	893	806	87	956	956	948	8
Rosemont	999	1,509	913	596	1,084	1,084	1506	(422)
Stripling	808	808	684	124	808	808	779	29
Dunbar	893	978	769	209	1,063	1,063	760	303
Wedgewood	893	935	959	(24)	893	935	989	(54)
Leonard	1,063	1,318	1,128	190	1,063	1,318	926	392
Glencrest	340	489	414	75	553	553	522	31
4 New Sixth Grade Centers					2,400	2,400	0	2,400
Totals	15,236		15,567	3,197	19,868		19,718	1,169

Note: Capacities are based on 25 students per instructional space x a utilization factor of 85 percent.

Source: FWISD Campus Data Analysis - By Campus #, 10/20/98 and FWISD Elementary, Middle and High School Enrollments and Projections prepared by Dr. Paul Geisel, February 9,1998.

While many of the existing middle schools appear to be over capacity, the four new sixth grade centers will have adequate capacity to accommodate these students.

**Exhibit 5-11
FWISD Elementary Schools Capacity Analysis**

School Name	Pre-Bond				Post-Bond			
	Permanent Capacity based on Number of Classrooms	Overall Capacity including Portables	Current Enrollment	(Over)/ Under Capacity	Permanent Capacity based on Number of Classrooms	Overall Capacity including Portables	2006-07 Enrollment	(Over)/ Under Capacity
Benbrook	475	673	610	63	653	653	579	74
I. M. Terrell	376	376	201	175	376	376	250	126

West Handley	238	436	396	40	436	436	400	36
Burton Hill	495	495	514	(19)	495	495	199	296
Carroll Peak	574	574	428	146	574	574	526	48
Carter Park	356	792	769	23	594	594	985	(391)
Manuel Jara	673	871	948	(77)	673	871	1349	(478)
George C. Clark	475	792	850	(58)	475	475	1129	(654)
Lily B. Clayton	277	594	470	124	554	871	624	247
Como	515	515	504	11	515	515	345	170
E M Daggett	871	871	906	(35)	931	931	909	22
Rufino Mendoza	673	792	716	76	673	792	908	(116)
De Zavala	436	475	457	18	436	475	402	73
Diamond Hill	594	713	803	(90)	733	851	887	(36)
S. S. Dillow	594	614	586	28	594	614	494	120
Maude I Logan	594	653	349	304	673	673	460	213
Eastern Hills	673	871	704	167	871	871	971	(100)
East Handley	297	475	419	56	475	653	400	253
Eastland	535	653	574	79	653	772	621	151
Harlean Beal	337	416	432	(16)	475	475	539	(64)
Glen Park	535	812	814	(2)	653	653	1119	(466)
W. M. Green	713	832	608	224	792	792	283	509
Greenbriar	436	792	791	1	594	594	926	(332)
Van Zandt-Guinn	356	356	276	80	356	356	221	135
Hubbard Heights	436	871	887	(16)	713	713	1023	(310)
H. B. Helbing	594	634	560	74	634	673	713	(40)
Milton L Kirkpatrick	337	455	395	60	337	416	536	(120)

Meadowbrook	495	614	769	(155)	653	772	625	147
D. McRae	535	614	673	(59)	614	614	581	33
Mitchell Boulevard	495	495	452	43	495	495	440	55
M. H. Moore	614	871	841	30	614	871	1170	(299)
Morningside	673	673	635	38	673	673	615	58
Charles E. Nash	218	317	228	89	218	317	275	42
North Hi Mount	317	416	334	82	317	416	558	(142)
Oakhurst	614	812	792	20	772	772	1171	(399)
Natha Howell	475	594	405	189	475	594	561	33
Oaklawn	396	515	472	43	653	653	374	279
A. M. Pate	495	574	566	8	495	574	898	(324)
Mary Louise Phillips	396	673	682	(9)	634	634	886	(252)
Ridglea Hills	396	614	610	4	634	634	908	(274)
Luella Merrett	376	693	705	(12)	673	673	685	(12)
Versia L. Williams	495	515	328	187	495	515	362	153
Marjorie M Walton	574	574	496	78	574	574	631	(57)
Sam Rosen	574	832	781	51	574	574	784	(210)
Sagamore Hill	376	792	747	45	614	614	1068	(454)
Bruce Shulkey	475	713	640	73	713	950	560	390
R. J. Wilson	436	752	782	(30)	673	673	1189	(516)
South Hi Mount	376	574	553	21	574	772	947	(175)
South Hills	455	614	714	(100)	455	455	624	(169)
Springdale	337	515	502	13	535	535	527	8
Sunrise	475	515	454	61	554	554	562	(8)
Tanglewood	218	495	548	(53)	594	594	797	(203)

W. J. Turner	495	911	854	57	634	634	1096	(462)
Washington Heights	238	356	344	12	238	356	411	(55)
Waverly Park	495	634	581	53	495	634	733	(99)
Westcliff	416	614	604	10	416	416	712	(296)
Westcreek	614	772	698	74	752	752	847	(95)
Western Hills	475	871	994	(123)	475	871	1086	(215)
Worth Heights	634	832	821	11	832	832	769	63
David K Sellars	535	574	538	36	535	574	519	55
J. T. Stevens	535	614	576	38	554	634	415	219
Atwood McDonald	356	475	449	26	356	475	400	75
Bill Elliott	594	713	710	3	594	713	840	(127)
Westpark	475	475	447	28	475	475	427	48
T. A. Sims	733	812	794	18	733	812	1216	(404)
Edward J. Briscoe	594	594	311	283	594	594	497	97
Woodway	495	634	771	(137)	713	713	619	94
Subtotals	32,432	42,649	40,168	2,481	38,610	42,154	46,183	(4,029)
12 New Elementary Schools with 28 Classrooms each = 336 Classrooms Total					6,653	6,653	0	6,653
Totals					45,263	48,807	46,183	2,624

Note: Capacities are based on 22 students per classroom x a utilization factor of 90 percent.

Source: FWISD Campus Data Analysis - By Campus #, 10/20/98 and

*FWISD Elementary, Middle and High School Enrollments and Projections
prepared by Dr. Paul Geisel, February 9, 1998.*

While many of the existing elementary schools are shown over capacity, the 12 new elementary schools will provide adequate enrollment capacity. As the new elementary schools are constructed, the district will have to adjust the attendance zones of the elementary schools to balance the capacity of existing schools with the capacity of the new schools.

Chapter 5

FACILITIES USE AND MANAGEMENT

A. Facilities Planning, Design and Construction Management (Part 3)

Exhibit 5-12 provides a summary of permanent classroom and instructional space capacity as compared to enrollment projections in fiscal year 2006-2007. At the high school level, the projections show there will be enough permanent capacity to house the entire high school student population.

At the middle school and elementary school level, projected enrollment exceeds permanent capacity but there is sufficient capacity in portable classrooms.

Exhibit 5-12
FWISD Summary of Permanent Capacity Analysis
After the Bond Program

School Level	Number of Permanent Classrooms or Instruction Spaces in 2006-07	Permanent Capacity in 2006-07	Projected Student Enrollment	Excess Permanent Capacity in 2006-07 (in students)	Percent of Permanent Capacity Used in 2006-07
Elementary	2,286	45,263	46,183	(920)	102.0%
Middle	822	17,468	19,718	(2,251)	112.9%
High	935	19,869	19,256	613	96.9%

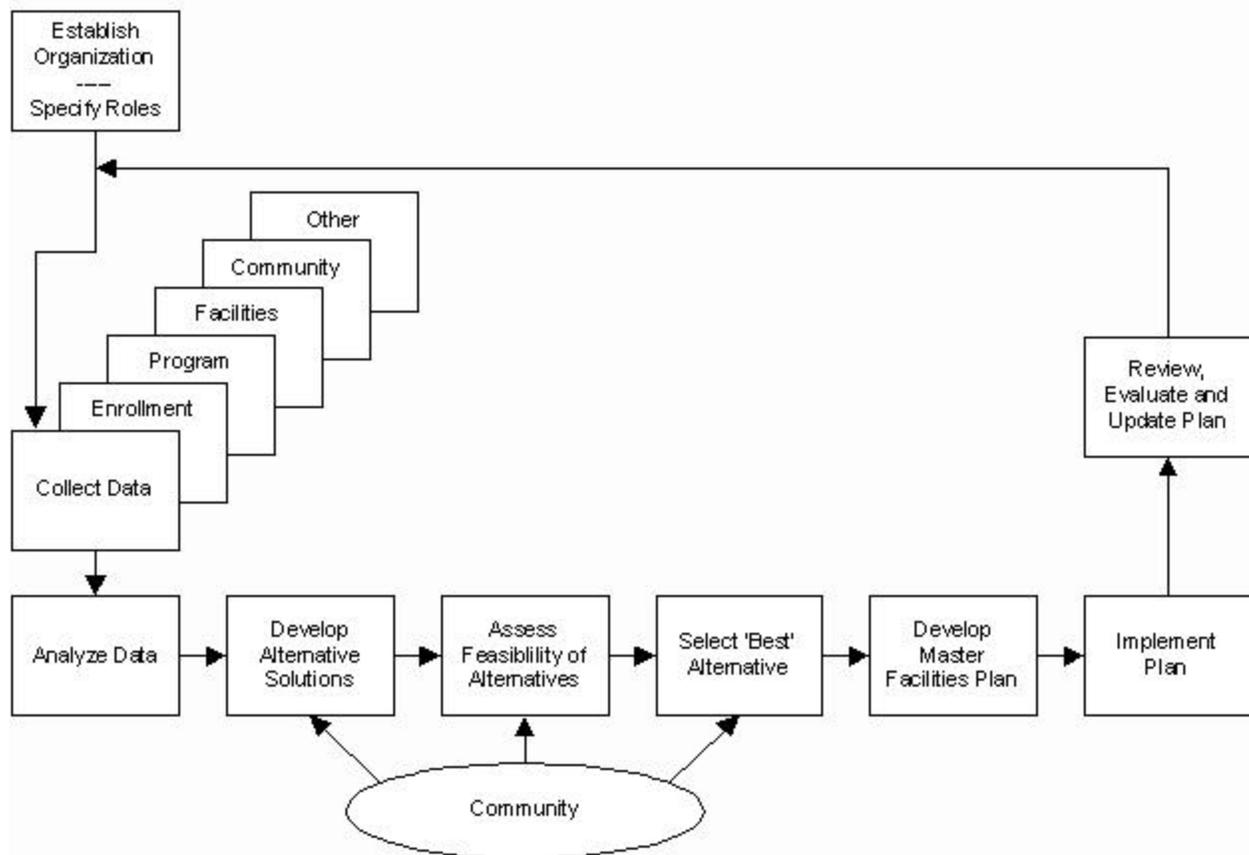
Source: FWISD Campus Data Analysis - By Campus #, 10/20/98 and FWISD Elementary, Middle and High School Enrollments and Projections prepared by Dr. Paul Geisel, February 9, 1998.

FINDING

The district does not have a comprehensive long-range facilities master plan. The master plan the district developed in support of the bond program does not allow the district to plan beyond the scope of the present bond or to look at strategies other than new facilities or modernizations.

Exhibit 5-13 shows the facilities planning process recommended by the Council of Educational Facility Planners, International (CEFPI).

Exhibit 5-13
Facilities Planning Process Recommended by CEFPI



Source: Council of Educational Facility Planners International, Guide for Planning Educational Facilities, 1991.

Prior to the 1999 bond election, the district undertook some of the steps in the facilities planning process similar to those outlined in **Exhibit 5-13**. A major shortcoming of the process the district undertook, however, was the lack of structure and leadership in organizing and analyzing the data that was collected. While the district collected much of the data necessary for a comprehensive long-range facilities plan, each of these data collection efforts was mostly a stand-alone process, as opposed to integrating all of the data into a comprehensive solution. Examples of the district's process and their general shortcomings are as follows:

- The district established a redistricting committee in September 1997. While this committee was very well organized and deliberate in its work, it was established as a stand-alone group. On February 28, 1998, the committee made recommendations to the board on redistricting separate from any other considerations normally factored into a long-range facilities plan.
- The district hired a consultant to generate enrollment projections even though the FWISD Research and Evaluation department produces its own enrollment projections. Additionally, the redistricting committee used the Research and Evaluation department projections while the consultant's enrollment projections were used to evaluate the need for additions and new schools by the facilities assessment group.

- District educators did not provide organized input concerning educational curriculum. Typically, the long-range facilities planning process involves a review of the educational delivery systems used by the district with a focus on review of delivery methods and teaching strategies. For instance, if the district elects to add emphasis to science at the upper grade levels it may dictate a need for additional laboratory space; increasing athletic opportunities for girls may dictate a need for additional athletic facilities; or a change in teaching delivery method, such as team teaching, may dictate a need for larger or differently configured classroom arrangements.
- FWISD does not have a standing planning committee. Typically, a school district will establish a long-range facilities planning committee composed of teachers, administrators, maintenance and operations personnel, parents, members of the business community, members of the community at large and students. This committee reviews any analysis of the data collected, is involved in the development of alternative solutions, assesses the feasibility of the alternatives and selects the best alternative to present to the board of trustees. By including a diverse committee in the planning process, a wide range of viewpoints can be considered in order to generate alternatives that respond to as many factors as possible. It is important for the planning committee to be an ongoing concern, because a long-range facilities plan should be a living document that is updated and reassessed annually.

In addition to the general shortcomings discussed above, the district's current master plan has several specific shortcomings. The master plan does not provide for the calculation of student capacities at each school before and after the new schools and additions planned in the bond are completed. There is no documentation of how the new schools and additions will affect the existing attendance zones or whether any consideration was given to adjusting attendance zones alone as a means of dealing with schools exceeding capacity. With the addition of 12 new elementary schools and additions and renovations at many other campuses, there should be some documentation as to which student populations at the existing schools will be affected, how the population might be reduced at existing schools, and whether the construction will result in under-utilized classroom space at existing schools.

The district's current master plan also does not indicate whether the district looked into consolidation of existing schools to address its space needs. For example, there are currently five schools with a population of fewer than 400 students and a total of 16 schools with a population of fewer than 500 students.

In addition, there is no documented consideration of the educational adequacy of existing and new facilities as part of the master plan. The facilities master plan should include a look at providing educational parity across the district for components critical to educational adequacy, such as: finishes, access to technology, ceiling height, lighting levels, square feet per student, student-to-teacher ratio, access to water or restrooms as well as other issues the district identifies as important to deliver instruction to students.

Prioritization of needs as listed in the FWISD master plan document is inconsistent. For example, at Northside High School, the replacement of the roof is given a priority ranking of 13 while expansion of the administration and support area is given a priority ranking of six. Roof replacement should be ranked ahead of renovation and expansion of the administration area. The roof is either leaking or at the end of its useful life, and its presence on the list reflects an operational component of the building that, if not

remediated, may allow deterioration of the structural and operational systems of the building. Issues of safety, code compliance and building integrity typically are a higher priority than other issues.

Prioritization of deficiency types for existing facilities is not consistent. For example, at South Hills Elementary, a school known to have indoor air quality problems, the HVAC replacement is given a priority ranking of five while a new library and administration area expansion is given a priority ranking of three. Again, issues of safety, code compliance and building integrity typically are a higher priority than other issues.

Finally, the master plan does not indicate if existing facilities were evaluated using the "Facilities Cost Index" or other methodology to determine if the buildings should be renovated or replaced.

Recommendation 45:

Develop a comprehensive long-range facilities master plan and update annually.

The district should form a long-range facilities planning committee consisting of teachers, administrators, maintenance and operations personnel, parents, members of the business community, members of the community at large and students. This committee should be involved in the development of the district's comprehensive long-range facilities master plan and should review and monitor the plan annually.

The facilities master plan should include opportunities for consolidation since the cost per student for operation and maintenance at a 400-student school is much higher than an 800-student school. The facilities master plan should include a look at providing educational parity across the district for components critical to educational adequacy such as: finishes, access to technology, ceiling height, lighting levels, square feet per student, student-to-teacher ratio, access to water and restrooms, as well as other issues the district identifies as important to deliver education to students. The district should plan to correct these deficiencies on a comprehensive districtwide basis to ensure parity of resources, allowing any student equal access to educational facilities at any school throughout the district. Additionally, the master plan should address how specific educational programs the district may adopt, or changes in educational delivery systems, will affect facilities.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The associate superintendent for Non-Instructional Services seeks board approval to hire a consultant to produce long-range facility plan.	August 2001
2.	The associate superintendent for Non-Instructional Services, together with other appropriate members of FWISD administration as determined by the superintendent, forms a long-range facilities planning committee.	September 2001
3.	The associate superintendent for Non-Instructional Service works with the long-range facilities planning committee and consultant to develop a comprehensive facilities master plan document.	October - December 2001
4.	The associate superintendent for Non-Instructional Services and the facilities committee	December 2001

	present the comprehensive facilities master plan to the board for review.	
5.	The board approves the facilities master plan.	January 2002

FISCAL IMPACT

Most, though not all, of the information necessary to produce a comprehensive long-range facilities master plan has already been collected. The bulk of the work remaining is to organize and consolidate the data and produce a comprehensive document. This recommendation can be accomplished by hiring a consultant to work with district personnel to produce this plan.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Develop a comprehensive long-range facilities master plan and update annually.	(\$25,000)	\$0	\$0	\$0	\$0

FINDING

The Facilities Planning, Design and Construction Management department does not use five-year enrollment projections. However, they do review the annual enrollment projections prepared by the FWISD Research and Evaluation department.

As previously mentioned FWISD is the ninth fastest-growing big city school district in the United States, adding 1,000 students annually. **Exhibit 5-14** presents the district's enrollment history and projections (see **Exhibit 6-21** in Chapter 6 of this document, which lists all of the projects needed to address the district's growing student enrollment).

**Exhibit 5-14
FWISD Student Enrollment History and Projections**

School Year	Actual Total Enrollment	FWISD Enrollment Projections
1995-1996	74,021	74,078
1996-1997	75,813	-
1997-1998	76,901	-
1998-1999	77,956	-
1999-2000	78,654	79,690
2006-2007	-	94,469

Source: Texas Education Agency AEIS District Reports and FWISD Elementary, Middle and High School Enrollments and Projections prepared by Dr. Paul Geisel, February 9, 1998.

The district relied on one set of enrollment projections prepared by an outside consultant, Dr. Paul Geisel of the School of Urban and Public Affairs at the University of Texas at Arlington, as the basis for student population growth for the bond projects. FWISD's Research and Evaluation department produces enrollment projections on an ongoing basis. The consultant's projections were prepared in 1998 and use actual enrollments for 1990 and 1996 as the basis to provide enrollment projections by school only for the years 2000 and 2007. These projections analyze the attendance zones by using traffic survey sample data from the Council of Governments. According to the consultant, this data can give an accurate basis for a population cap on potential enrollment as well as socio-economic considerations. The data sets established from the traffic surveys were used to make enrollment projections based on historic student attendance patterns. The enrollment projections prepared by the consultant for the years 2000 and 2007 are further divided into low and high projections depending upon factors such as a stable economy, new housing starts and a low dropout rate. For purposes of planning for the bond issue, the district elected to use the high projections for 2007. As can be seen in **Exhibit 5-14**, the district's enrollment projection for the 1999-2000 school year was slightly ahead of the actual enrollment. Additionally, while the district's enrollment projections do track special schools, they do not track special populations, which are often housed in regular campuses.

FWISD's Research and Evaluation department develops two types of enrollment projections:

- Annual projections for each grade at each campus using a linear model based on seven years of data submitted to PEIMS. The resulting projections are reviewed by staff and school personnel to adjust for shifts in residential construction.
- Enrollment projections for new construction are developed based on a mapped model of student residences by street using the current student database. The board of trustees and Operations department develop target enrollments for each affected school. Boundary estimates are developed and reviewed with the public before the boundaries are finalized.

Typically, long-range plans use five-year enrollment projections based on the "cohort-survival method" because they tend to provide "middle of the road" projections. The "cohort-survival method" allows the district to develop average rates of student progress from Kindergarten through twelfth grade, also known as the survival rate. These survival rates are developed using the district's own historical data, and have proven to be very accurate for other districts. Enrollment projections that are updated annually allows a district to recognize unforeseen population changes and to shift resources such as staff and portable buildings to areas or schools that experience minor or temporary fluctuations in enrollment. Annual enrollment projections also help district management become aware of changing trends early enough to plan for permanent solutions.

Recommendation 46:

Develop five-year enrollment projections for all schools by grade level, and update the enrollment projections annually.

The Facilities Planning, Design and Construction Management department should work with the FWISD Research and Evaluation department to develop five-year enrollment projections by grade and by school and update these projections annually. These enrollment projections should include student socio-economic data, as well as growth data and residential construction trends from the county and city. The annually updated five-year enrollment projections should be evaluated against the projections used in the planning of the bond projects and the facilities master plan to assure that the projects, when complete, will accurately respond to the student population. Additionally, these annual enrollment projections can be used in evaluating and adjusting attendance boundaries to help relieve overcrowding or excess capacity at individual schools.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The associate superintendent for Non-Instructional Services meets with the head of the Research and Evaluation department on the need for five-year enrollment projections by grade and by school, including analysis of socio-economic data and growth trends.	July 2001
2.	Research and Evaluation department updates five-year enrollment projections annually and provides them to Facilities Planning, Design and Construction Management department for use in updating the facilities master plan.	October 2001 and annually

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

FWISD's contracted project management firm does not provide adequate project status reports in a timely manner or regularly update the district's bond project website.

One of the primary responsibilities of a program manager is to keep the board and administrations informed of the status of all projects on an on-going basis for the length of the bond program. At FWISD the primary point of contact between the bond manager and the district is the associated superintendent of Non-instructional Services. While projects associated with the bond program have been proceeding satisfactorily to date, there has been a consistent lack of written and graphic documentation provided by the bond program manager to the district. For instance, the last presentation to the board for the 1999-2000 fiscal year on the financial status of the bond projects was made in October based on a document prepared by the bond program manager in August 2000. This August 2000 document consisted of only two pages, which is not sufficient to present the status of a \$398 million bond program.

In addition to the lack of documentation on the financial status of the bond projects, documentation to the board and administration on day-to day issues of the projects, such as, meeting minutes, schedules, design sketched for projects in design and potential change orders, delays or other critical issues for projects in construction has been inconsistent.

Finally, the bond project website maintained by the bond program manager has also not been updated regularly during the course of the bond program work. The public can gain access to the FWISD project website by a link on the district home page. FWISD is not taking full advantage of this valuable and extremely cost effective tool to communicate with the public on issues concerning the bond projects design and construction.

A website is an excellent opportunity for citizens to see construction progress photographs, completed facility photographs, updated construction schedules for individual projects and the entire bond package and updated construction budgets. Properly used, the website can offer the public a full view of the bond construction process and allow the community to track the district's progress.

Recommendation 47:

Provide the board and the superintendent monthly updates regarding the overall status of the bond program, the status of each individual project and any website updates.

The associate superintendent of Non-Instructional Services should be responsible for monitoring the program manager and ensuring that they provide a document organized by board member district that summarizes the progress of the bond program and the status of each project including the following information:

- Financial status of the bond program including budgets for each project. Projects in design should use an estimated construction budget, and projects in construction, or complete, should use actual bid amounts including change orders. Fees or costs that were estimated in the planning for the bond program such as permit fees and land acquisition costs should be updated using actual costs as soon as available.
- The complete status of each project including: a general description; a discussion of the relevant issues or problems concerning the project; current schedule information, including a description of any changes made since the last update; detailed budget information, including discussion of any change to estimated construction cost or changes in fees to consultants; up-to-date drawings for projects in design or progress photographs for projects in construction; discussion of requests for information and submittals for projects in construction and change orders and potential change orders.
- Any website information to be added or updated by the district including: photographs, schedules or budgets for all projects.

In addition to the bond program status information to be provided to the board and superintendent, the program manager should provide written or graphic documentation to the associate superintendent, non-instructional services memorializing all day-to-day information, milestones and decisions for each bond program project.

The district should also obtain a commitment from the bond program manager to provide updated materials for the website monthly. The district should transfer the responsibility to maintain the website to the FWISD Office of Communications, who maintains the district website. Monthly updates should include all projects active in design or construction, and should contain updated drawings or renderings,

construction photographs, construction and design schedules, schedules for meetings and opportunities for input by the public and updated project budgets.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The associate superintendent of Non-Instructional Services requires the bond program manager to provide documents to the board and superintendent advising of the overall status of the bond program and the status of each individual project and also provides the district's website host with monthly updates of photographs, schedules, and budgets for all active projects.	June 2001 and monthly
2.	The associate superintendent of Non-Instructional Services requires the bond program manager to provide written or graphic documentation for all projects such as meeting minutes, schedules, design sketches for projects in design and potential change orders, delays or other critical issues for projects in construction and updated material to the district's website host.	June 2001 and weekly

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

Chapter 5

FACILITIES USE AND MANAGEMENT

B. Plant Maintenance

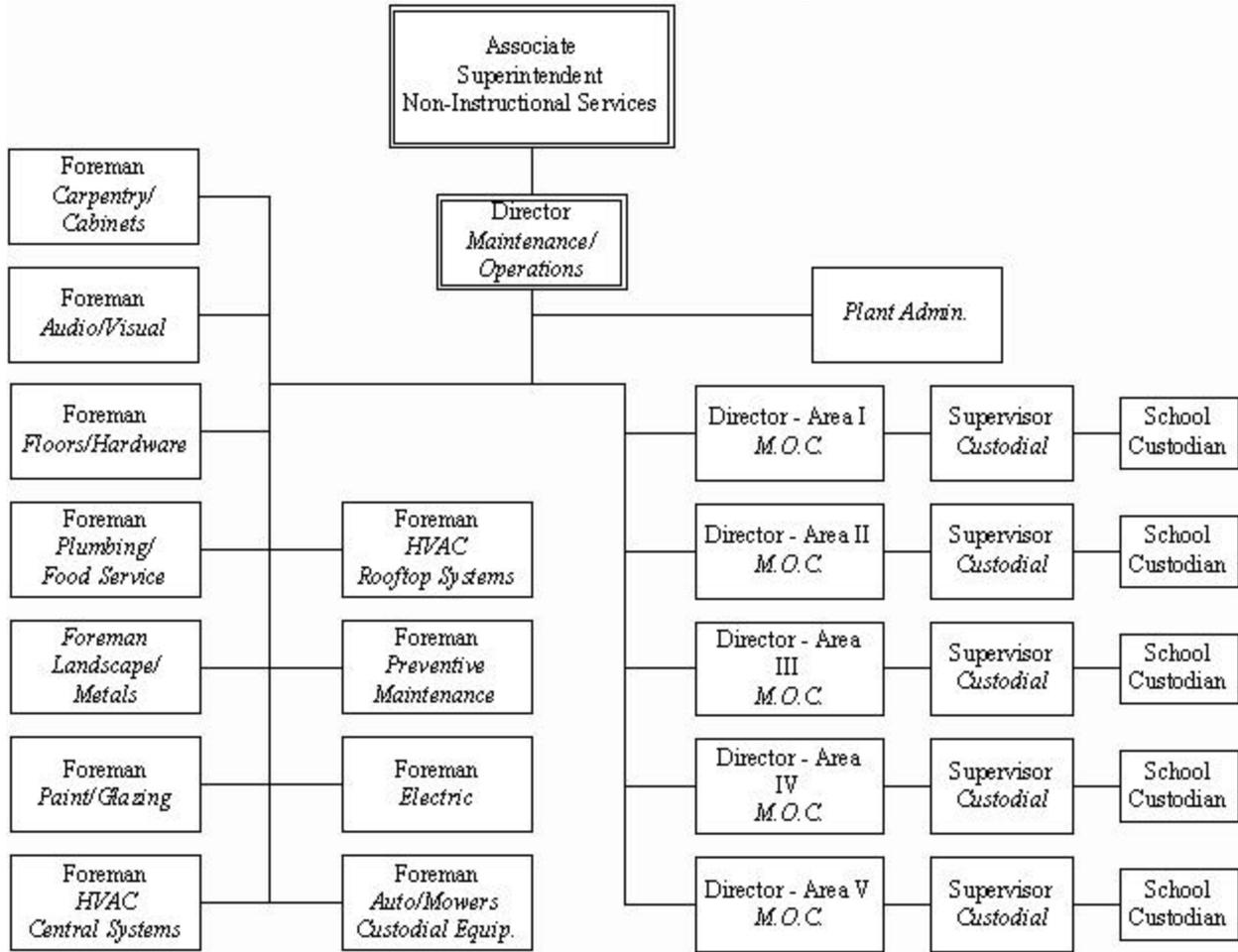
The mission of a typical school district facilities management department is to provide for a physical environment that enhances teaching and learning. The major ongoing facilities management activities in FWISD are the responsibility of the Maintenance and Operations department. The goals of an effective maintenance and operations department are to:

- Extend the life of facilities and maximize their potential use;
- Increase facilities staff productivity;
- Select the most cost-effective methods for operations;
- Improve and maintain the aesthetics of facilities;
- Implement programs to conserve energy; and
- Ensure the safety and security of people and buildings.

Efficient and effective maintenance operations in a school district require well-defined processes, including adequate information to plan and manage daily maintenance operations, a work-order system that helps maintenance workers respond quickly to repair requests and provides cost data for billing user departments, a preventive maintenance system that ensures maintenance workers will regularly service equipment to minimize equipment down-time and a mechanism to monitor maintenance service levels and obtain periodic feedback about functions that need improvement.

Exhibit 5-15 shows the organizational structure of the FWISD Maintenance and Operations department.

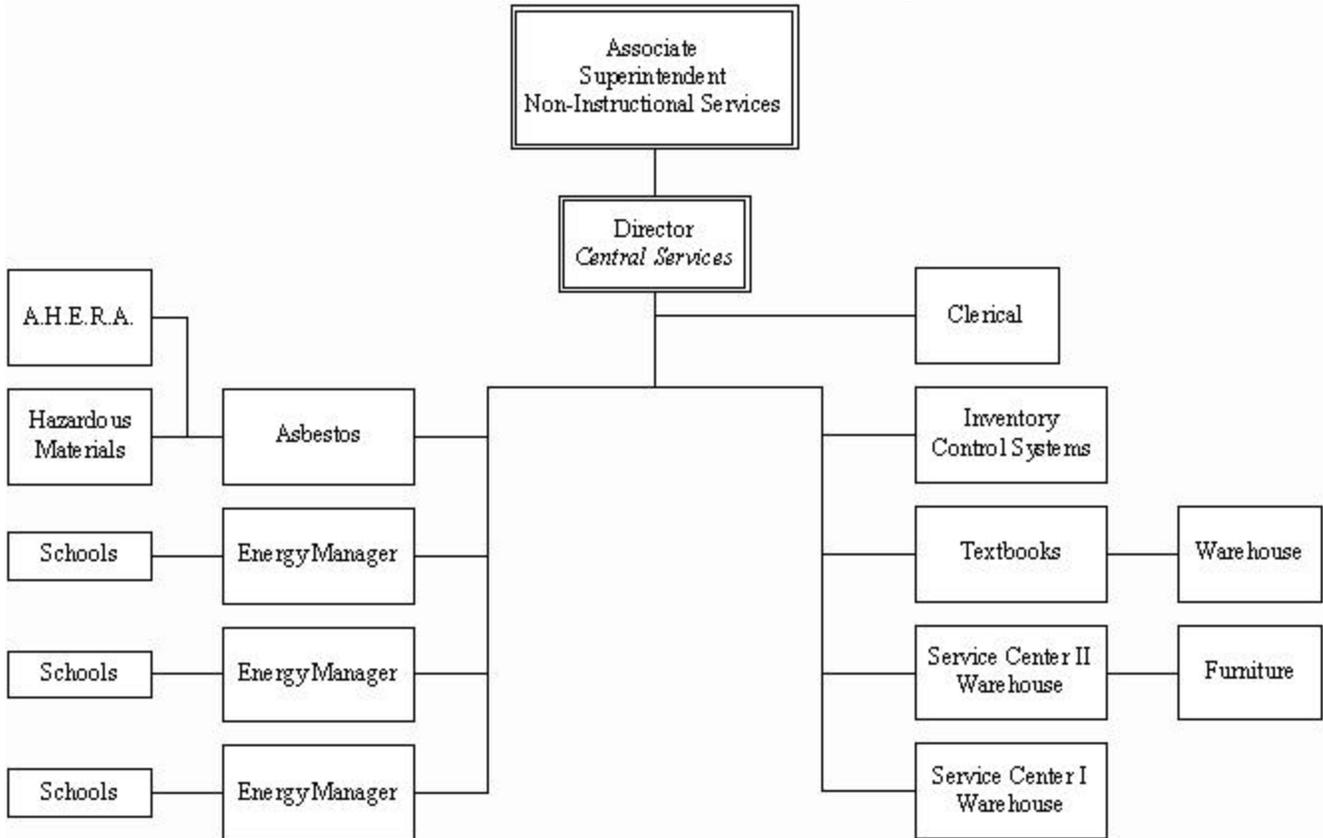
Exhibit 5-15
Organization of the FWISD Maintenance and Operations Department



Source: FWISD Organization, updated January 16, 2001.

Exhibit 5-16 shows the organizational structure of the Central Services department, which contains some services related to the Maintenance and Operations department.

**Exhibit 5-16
Organization of FWISD Central Services Department**



Source: FWISD Organization, updated January 16, 2001.
 Note: A.H.E.R.A. - Asbestos Hazard Emergency Response Act.

The Maintenance and Operations department has a staff of 332 and a budget of \$51.7 million for fiscal 2000-01. The department is responsible for maintaining 70 elementary schools, 22 middle schools, 13 high schools, 31 alternative schools and various administrative and support facilities with a total of approximately 8.5 million gross square feet. **Exhibit 5-17** shows the expenditure history of the maintenance department. The large increase in expenditures in the 1997-1998 school year can be attributed to facility assessments and preparations for the bond program. **Exhibit 5-18** shows the Maintenance and Operations cost per student for FWISD and its peer districts. The exhibit demonstrates that FWISD's plant maintenance cost per pupil of \$697 is the highest of all districts presented.

**Exhibit 5-17
Maintenance Department Expenditures History**

Function	School Year			
	1996-1997	1997-1998	1998-1999	1999-2000
Salaries and Benefits	\$9,103,542	\$9,508,838	\$10,163,721	\$11,593,871

Contracted Services	962,120	640,086	729,530	621,447
Supplies	5,182,299	7,932,806	9,602,819	7,183,839
Other Operating Costs	34,185	13,293	25,555	16,201
Capital Equipment	2,044,971	21,291,495	1,155,549	401,727
Totals	\$17,327,117	\$39,386,518	\$21,677,174	\$19,817,085

Source: FWISD Finance Department.

**Exhibit 5-18
Plant Maintenance and Operation
Cost per Student 1998-1999**

District	M & O Cost per Student
Fort Worth ISD	\$697
Dallas ISD	\$640
Houston ISD	\$616
Austin ISD	\$584
El Paso ISD	\$501
Peer District Average	\$585

Source: Texas Education Agency - Data Central, Financial Data
Mart Reports, Total Actual Expenditures by Function General Fund
Per Enrolled Student Per Fiscal Year.

The maintenance function is divided into 11 shops or trade functions, with each shop led by a foreman. **Exhibit 5-19** lists the number of personnel in each shop.

**Exhibit 5-19
Number of FWISD Personnel by Shop or Trade
2000-2001**

Trade/Shop	Foreman/ Supervisor	Personnel/ FTEs
Floors/Hardware	1	56
Plumbing/Food Service	1	33

Landscape/Metals	1	34
Paint/Glazing	1	34
HVAC Central Systems	1	18
HVAC Roof Top Systems	1	22
Preventive Maintenance	1	54
Electrical	1	18
Auto/Mowers/Custodial Equipment	1	10
Carpentry/Cabinet	1	24
Audio-Visual	1	18
Total	11	321

Source: FWISD Maintenance & Operations Department.

The Maintenance and Operations department maintains four "preventive maintenance" buses. The buses are staffed with a carpenter, painter, electrician and plumber and visit each school on a rotating schedule to handle minor maintenance functions. Each school is scheduled to receive a visit from a maintenance bus once in the fall and once in the spring. Elementary schools are to receive a total of four days per year, middle schools are to receive ten days per year and high schools are to receive fourteen days per year.

The review team conducted surveys of primary users to assess their level of satisfaction with facility conditions and services provided by the Maintenance and Operations department. Three primary groups of facilities users were asked specific questions concerning maintenance and repair of facilities. The three user groups included school district administrators, principals and teachers. **Exhibits 5-20** and **5-21** show a high level of dissatisfaction with the timeliness of maintenance and repairs in the district.

Exhibit 5-20
Survey Responses to the statement
"Buildings are properly maintained in a timely manner."

Group	Agree/ Strongly Agree	Neutral	Disagree/ Strongly Disagree
Administrators	53%	12%	35%
Principals	47%	5%	48%
Teachers	38%	5%	57%

Source: TSPR survey, October 2000.

Exhibit 5-21
Survey Responses to the statement
"Repairs are made in a timely manner."

Group	Agree/ Strongly Agree	Neutral	Disagree/ Strongly Disagree
Administrators	41%	14%	46%
Principals	25%	6%	70%
Teachers	26%	6%	68%

Source: TSPR survey, October 2000.

FINDING

The district has been inappropriately using Maintenance and Operations staff to perform work associated with the school district's bond projects. The district used bond funds to support the Maintenance and Operations department's budget for bond project work performed by Maintenance staff. In addition, the work volume on bond projects diverts the staff's time away from their primary responsibility of maintaining existing facilities. This may be part of the reason for the lack of timeliness in building repairs identified by school district personnel in **Exhibits 5-20** and **5-21**.

Work associated with a school district's bond program should be performed by the contractors for the various building projects or, in the case of smaller scopes of work that are not part of larger building projects, the work should be bid out separately to be performed by separate contractors.

Recommendation 48:

Ensure that maintenance staff are not assigned to work on bond projects.

The maintenance director should make certain that all foremen, and other staff involved in scheduling work, do not allow any maintenance personnel to work on bond projects. The maintenance director should make certain that maintenance personnel are completely and fully scheduled to accomplish the work of the maintenance department, including timely responses to work order requests for repairs.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	Maintenance director meets with the foremen of all trades and all others responsible for scheduling or assigning maintenance staff, and representatives of the bond program to advise that maintenance shall not be assigned to bond projects.	June 2001
2.	Maintenance director shall review all maintenance staffing reports monthly.	June 2001 and monthly

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

FWISD's cost structure for maintenance and operations functions is approximately 19 percent higher per student than the average for these same services in the peer districts. El Paso ISD and Austin ISD have a similar number of students as FWISD, yet their maintenance staffs number between 220 and 240 personnel compared to 332 at FWISD, a difference of 92 FTEs.

While this higher number of FWISD maintenance personnel drives the cost to deliver maintenance and operations higher than those of their peer districts, the users of FWISD district facilities still have a very low level of satisfaction with the timeliness of maintenance and repairs as shown by **Exhibit 5-20** and **Exhibit 5-21**.

Recommendation 49:

Develop a pilot project to determine the effectiveness of outsourcing some maintenance functions to decrease costs and increase user satisfaction.

The district should choose one skill or trade to use as a pilot project to determine if these services can be performed less expensively, and at a higher level of user satisfaction, than the district can provide with its own personnel. It is recommended that FWISD use painting as the pilot outsourcing project.

The TSPR review team applied the "Yellow Pages" Test to all services in this review, including maintenance. Under this test, if at least three companies in the local yellow pages perform a particular service that also is being delivered by a government entity, government should consider outsourcing that service. When the "Yellow Pages" Test was applied to painting, TSPR found a number of qualified providers in the Fort Worth Yellow Pages.

The Maintenance and Operations department should develop cost estimates using in-house painting personnel for particular projects and an expected timeframe to complete the work. The in-house cost estimate should include all applicable costs such as direct and indirect personnel expenses, supervision, tools, materials and vehicle expenses. The Maintenance and Operations department should then seek bids from private vendors with cost and timeframe information. The department can then make its own determination on who should receive its business based on cost and timeliness. If it is consistently demonstrated that private vendors are less expensive than district painting staff, while still timely, the district should outsource its entire painting function.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The associate superintendent for Non-Instructional Services asks for board approval to seek bids from outside vendors for painting pilot project.	September 2001
2.	The director of maintenance develops a bidding process for painting projects.	October 2001
3.	The director of maintenance evaluates in-house costs for painting against bids from outside	December

	venders to determine if the maintenance department will use in-house painters or outside contractors.	2001
4.	The associate superintendent for Non-Instructional Services seeks board approval to use outside venders for painting if it is determined they are less expensive.	February 2002
5.	The director of maintenance begins implementing the new painting policy if outside venders are used.	September 2002

FISCAL IMPACT

FWISD employs 32 painters for a total of \$1,112,033 annually. This translates into an average hourly rate of \$16.71 (\$1,112,033/2,080 hours). Based on Bureau of Labor statistics for the Fort Worth area, the average hourly rate for painters in the private sector is \$13.40. These rates indicate that FWISD is paying approximately 25 percent more per hour for painting than a private sector contractor. For the purpose of calculating this fiscal impact, it is assumed that the benefits rate per hour will be the same for FWISD as for the private sector, although it is likely that the FWISD rate is actually higher. The district can expect to realize at least a 10 percent savings, or \$111,203, annually (\$1,112,033 x 10 percent) on painting labor by outsourcing all or part of the work. If the district determines that outsourcing the painting function saves money, there would be no fiscal impact the first year since the painters have a contract through August 31, 2002.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Develop a pilot project to determine the effectiveness of outsourcing some maintenance functions to decrease costs and increase user satisfaction.	\$0	\$111,203	\$111,203	\$111,203	\$111,203

FINDING

The FWISD Maintenance and Operations department uses an out-dated automated work order system that is cumbersome, requiring excessive manipulation to maintain and track such data as work status, labor hours, and supplies and materials costs.

The work-order system was developed in 1992 by FWISD staff. It is written using the D Data system on a DOS platform. The D Data system requires work orders to be generated at each school. It relies on the party generating the work order to assign priority level and skilled trade codes. At the end of each day, the priority one work orders are printed and put in the mailbox of the foreman of the appropriate skilled trade. Each morning the foremen review all of the previous day's top priority work orders and either accept the priority and assign the work to a craftsman, reassign a lower priority to the work order and put it back in the system for future scheduling or reject the work order. If the school reimburses the Maintenance and Operations department for the cost of the work, the work order must be re-entered with the appropriate reimbursable charge code. After a work order is completed, craftsmen write on the paper copy of the work order the materials and worker hours applied and the completion date, as well as other comments. The paper copy of the completed work order is given to clerical staff to enter the updated

data into the D Data work order system. At this time the priority of every completed work order is changed to 9, preventing the district from analyzing closed work orders by priority.

The D Data system does not contain a clear system of priorities that is understood by all people who use it. For instance, some principals believe that giving a work order a higher priority than the nature of the work demands will get the work done more quickly.

The D Data system does not schedule maintenance tasks based on priority. Foremen distribute the highest priority work orders to craftsmen the morning after they are received. The Maintenance and Operations department has no schedule showing when orders will be filled. Some schools assume that, since a considerable amount of time has passed since the work order was submitted, it has been cancelled or lost and a new work order for the same work is initiated, generating multiple work orders for the same task.

On the first day of each fiscal year, the D Data system cancels all reimbursable work orders that have not been completed within the preceding fiscal year. Each school is notified by the respective foreman in person, by telephone or by e-mail six to eight weeks prior to the end of the fiscal year that the work order will not be completed in the current fiscal year. If a school still wants the reimbursable work order to be completed, staff must enter a new work order with a new reimbursable charge code at the beginning of the new fiscal year.

The D Data system does not provide scheduling between different trades for work that is sequential. For instance, when installing a new door frame, there is no sequencing between the carpenter who will install the door frame and the painter who will paint it after it is installed. This lack of coordination can result in unnecessary trips to work sites.

The district does not develop cost estimates for work orders unless the work order is reimbursable to the maintenance department. Additionally, the D Data system is not used to track the estimated versus the actual cost of work orders

The D Data system does not allow tracking of the time it takes the district to complete work orders by priority, because the priority of a completed work order is changed. Without the ability to generate this information, it is not possible for the district to know if it is responding within an appropriate time frame for different priority levels.

The D Data system development and maintenance resides almost completely with one individual in Information Services. Should the district lose the services of this individual, their ability to use and maintain the system is greatly compromised. In addition, it is so cumbersome and time consuming to generate reports in the system that it is not used to monitor staff performance.

Recommendation 50:

Purchase and implement a maintenance management system to assist the district in prioritizing and scheduling work and ensuring critical tasks are accomplished.

The maintenance department should purchase a commercially available maintenance management software system and initial setup and support from a private vendor. The system should have the following minimum capabilities:

- A database that supports CAD drawings, photographs and text-based reports, so the district can store all this information in one central location.
- A database that supports text-based reports.
- The ability to create a clear and simple system of priorities to be used by all personnel who initiate work orders.
- Schedule work orders automatically based on priority.
- Schedule preventive maintenance work orders automatically based on calendar or meter information.
- Generate a series of pre-defined reports by item, school, area, district, trade and date.
- Internet or intranet access that allows school staff to generate maintenance requests and check the status of each request.
- Inventory control, including tracking stock levels, and automatic reports suggesting stock ordering.
- Personnel management, including cost information, employee records and certification and training.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Maintenance and Operations obtains approval from the associate superintendent for Non-Instructional Services to issue a Request for Proposals to find providers for a maintenance management system with the required capabilities.	June - August 2001
2.	The director of Maintenance and Operations presents an analysis of the proposals submitted by software program vendors along with an implementation plan to the associate superintendent and the board of trustees.	September 2001
3.	The board of trustees evaluates the maintenance management system alternatives and the proposed implementation plans.	October 2001
4.	The board of trustees approves the director of Maintenance and Operations recommendation.	October 2001
5.	The director of Maintenance and Operations purchases the maintenance management system.	November 2001

FISCAL IMPACT

Although this recommendation would result in an initial expenditure for FWISD, a full-featured maintenance management program should result in significant savings for the district over time. A system with the recommended capabilities would cost the district about \$65,000 (\$50,000 for software and \$15,000 for training and consulting services), based on the review team's research of available systems. The benefits of the new system are difficult to quantify, and therefore are not included in this fiscal impact. However, with a work-order system to help improve worker productivity and eliminate unnecessary or duplicate work, the district should be able to reduce maintenance supply costs and

maintain the same number of maintenance staff even though the number of facilities will increase due to the 1998 bond program.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Purchase and implement a maintenance management system to assist the district in prioritizing work and ensuring critical tasks are accomplished.	(\$65,000)	\$0	\$0	\$0	\$0

FINDING

The services provided by the Maintenance and Operations department's preventive maintenance buses are not coordinated with the maintenance work assigned through the work-order system.

To address what has been perceived as slow response time to low priority maintenance projects and convenience items at the schools, the Maintenance and Operations department has four preventive maintenance buses that visit each school twice a year. Several weeks before a preventive maintenance bus is scheduled to visit, the school is notified of the dates of the visit and asked to create a list of work items.

Typically, the principal will solicit input from teachers and custodial staff and develop a list of items ranging from very minor repairs to capital projects. One to two weeks prior to the scheduled visit, the head of preventive maintenance reviews the list with the school principal and removes any items that cannot be completed within the timeframe of the scheduled visit, are beyond the expertise of the crew or are items that should be submitted as work orders.

Although the intention of the bus program is to perform preventive maintenance that should ultimately reduce the need for major repairs, the bus crews actually perform low priority maintenance and convenience projects such as painting, hanging chalkboards and adding electrical outlets. This not only results in duplicated efforts on behalf of the Maintenance and Operations department, but it also circumvents the intended purpose of the preventive bus program.

Recommendation 51:

Integrate the scheduling and assignment of the work of the maintenance buses with the maintenance work order system, and ensure that all schools receive adequate preventive maintenance.

FWISD should expand the number of maintenance bus visits made to schools, and expand the makeup of the bus crews to allow them to handle lower priority work orders, minor convenience items and preventive maintenance tasks.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Maintenance and Operations identifies the work order priorities that are	June 2001
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	most suitable for the maintenance buses.	
2.	The director of Maintenance and Operations assembles additional maintenance bus crews from existing maintenance personnel.	July - August 2001
3.	The expanded maintenance bus crews visit schools twice as often and perform low priority work orders and preventative maintenance in addition to the minor convenience items negotiated with school principals.	September 2001 Ongoing

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

The Maintenance and Operations department does not have a procedures manual that describes emergency utility cut-off locations and procedures for each campus.

Such a manual would help all maintenance employees pinpoint the locations of utility cut-offs needed for any type of emergency repair. For example, a painter finding a water leak can locate the valve and turn off the water until a plumber arrives to repair the leak. However, the painter would need to be aware of the associated procedures that must be followed, such as notifying the principal and possibly initiating an evacuation of the building.

Many large school districts are developing utility cut-off manuals due to the large number of facilities in the district. With so many facilities, the average maintenance employee cannot know where all of the utility cut-offs are located at any given school. The problem is compounded at night when personnel familiar with the school are not available to provide the locations of the utility cut-offs.

Recommendation 52:

Develop a utility cut-off procedures manual and distribute copies to maintenance staff.

The maintenance department should develop a utility cut-off procedures manual that identifies where the emergency shut off is for each utility at each school or location. One copy of the manual should be kept in a standard location at all facilities, such as in the custodial office. A second copy of the manual should be kept in the maintenance department for quick reference in the event of an emergency.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Maintenance and Operations instructs each of the five area Maintenance and Operation Custodial directors to develop utility cut-off manuals for all facilities in their areas.	June - July 2001
2.	The director of Maintenance and Operations distributes cut-off procedures manuals to the foreman of each trade/skill, and ensures that a copy is placed in a standard location in each facility.	August 2001

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

FWISD's Maintenance Department does not have a comprehensive preventive maintenance program.

A comprehensive preventive maintenance program extends the life of the school district's facilities, and ensures that they operate at optimum efficiency. A preventive maintenance program also identifies potentially costly repairs to facilities and equipment earlier. Many school districts have preventive measures that include air conditioning system cleaning and testing, cleaning of plumbing systems and roof drainage, inspection of interior and exterior lighting, bleacher maintenance, interior finish inspection and cleaning and exterior lighting and finish assessment.

An example of a comprehensive preventive maintenance program used by Spring ISD in Houston, Texas is illustrated in **Exhibit 5-22**.

Exhibit 5-22
Comprehensive Preventive Maintenance
Program Schedule Example

Preventive Maintenance Activity	Activity Frequency
Clean A/C unit filters	Every 2 months
Change A/C unit filters	3 to 12 week intervals
Clean chiller condenser coils	Every 2 years
Clean fan coil and air handler evaporator coils	Annually
Clean ice machine condenser coils	Every 4 months
Inspect and capacity test chillers	Annually
Change chiller compressor oil and cores	Every 2 years
Check chemical levels in closed loop chilled and hot water piping	Monthly
Clean grease traps	Every 3 months
Inspect and test boilers	Annually
Check roofs, downspouts, and gutters	Monthly, repair as needed - 20 year roof replacement
Inspect exterior lighting	Every 6 months

Inspect elementary play gym lighting	Annually
Inspect and clean gym gas heaters	Annually
Inspect playground equipment	Monthly, repair as needed
Clean fire alarm system smoke detectors	Every 6 months
Inspect all interior and exterior bleachers	Annually, repair as needed
Clean, tighten, and lubricate roll out bleachers	Annually
Check exterior building and concrete caulking	Annually - 8 year replacement
Stripe exterior parking lots	Annually
Check condition of asphalt parking lots	Annually - 12 year replacement
Check carpet	15 year replacement
Check vinyl composition tile floors	20 year replacement
Spray wash exterior so fits (??) and building	Every 2 years, or as needed
Replace glass and Plexiglas	As needed
Paint interior of facilities	Every 5 years
Paint exterior of facilities	Every 8 years
Perform general facility inspections	Annually

Source: Spring ISD Preventive maintenance program, 1997.

Recommendation 53:

Implement a preventive maintenance program that provides regularly scheduled reviews and repairs for all areas of facility maintenance.

The director of Maintenance and Operations should develop a comprehensive preventive maintenance program and schedule based on research involving other school district programs within the state and industry recommendations and standards. The new preventive maintenance program should include all items or equipment that require regular service or maintenance such as the items identified in **Exhibit 5-22**. The new preventive maintenance program and schedule should become part of the new maintenance management system with work orders automatically generated based on the time intervals or meter milestones identified in the preventive maintenance program.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The associate superintendent for Non-Instructional Services develops a policy for performing preventive maintenance on district facilities.	June 2001
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2.	The director of Maintenance and Operations develops preventive maintenance procedures for all areas.	July 2001
3.	Maintenance and Operations area directors implement the preventive maintenance procedures for all facilities.	August 2001

FISCAL IMPACT

The recommended preventive maintenance program will require two full time maintenance employees. The mid-point annual salary for a general maintenance worker from FWISD's pay scale 2 for a 260-day employee is used to calculate this fiscal impact. The total annual fiscal impact is \$59,844, which is calculated as [midpoint salary of \$22,589 + (\$22,589 x .2423 benefit rate) + (\$1,860 flat benefit rate)] for each of 2 employees. In addition, this fiscal impact will require an additional \$10,000 annually in miscellaneous materials for a total yearly cost of \$69,844.

Initial start-up costs will be offset in later years through increased efficiencies. It is estimated that preventive maintenance measures will save up to 10 percent in the long-term costs of emergency repairs.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Implement a preventive maintenance program that provides regularly scheduled reviews and repairs for all areas of facility maintenance.	(\$69,844)	(\$69,844)	(\$69,844)	(\$69,844)	(\$69,844)

FINDING

FWISD does not have a formal training program for its maintenance staff.

Currently, opportunities for training for maintenance staff are sporadic and informal. Without proper training, maintenance staff may not have the most up-to-date information on new FWISD department policies and procedures, expectations of management, quality control procedures and new or revised professional skills. At a minimum, a maintenance training program should include the following subject areas:

- Effective work scheduling;
- Personnel management strategies;
- Interdepartmental communication skills;
- Professional skill development for each trade;
- Work habits;
- Time management; and
- Quality control.

Recommendation 54:

Provide a comprehensive training program for the maintenance staff to improve effectiveness and productivity.

The director of Maintenance and Operations should develop a training program for all levels of staff and all trades. As a response to the results of the TSPR survey previously shown in **Exhibit 5-20** and **Exhibit 5-21**, the primary focus of the training program should be on increasing efficiency and timeliness through more effective work scheduling, improved work habits, and time management, as well as professional skills development. The program should have annual goals and objectives for each employee, and be integrated and tracked by the new maintenance management system software.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Maintenance and Operations, in conjunction with the Human Resources department, and with input from the staff, develops a training program curriculum, schedule, and budget.	June 2001
2.	The associate superintendent for Non-Instructional Services reviews the training program and submits it to the board for approval.	August 2001
3.	The board reviews and approves the training program and budget.	September 2001
4.	The director of Maintenance and Operations initiates the training program.	October 2001

FISCAL IMPACT

The required planning and implementation of this recommendation can be accomplished within the district's existing resources. The training program should be developed and conducted by the Maintenance and Operations custodial area directors and trade foremen. Any loss in productivity by trade foremen performing training will be more than offset by increased productivity and efficiency of staff receiving training. This recommendation can be accomplished with existing resources.

Chapter 5

FACILITIES USE AND MANAGEMENT

C. Custodial Services

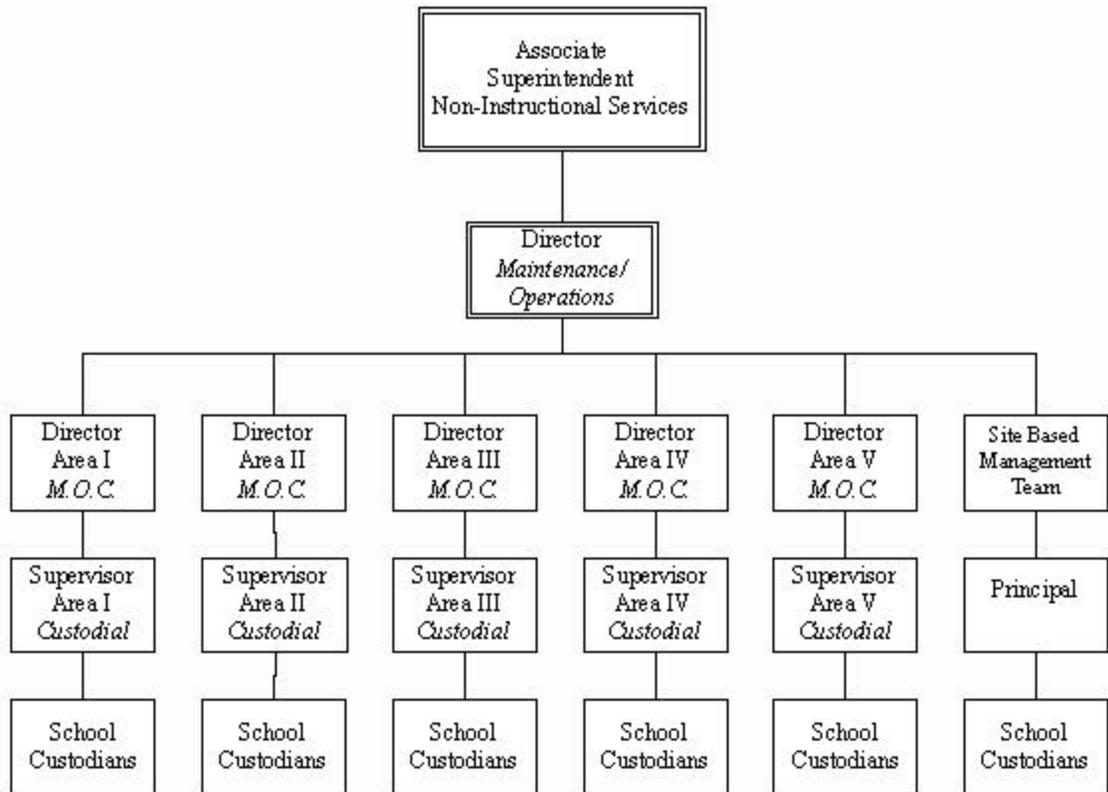
The Maintenance and Operations department is responsible for housekeeping programs for the district. FWISD offers a unique service program for all locations that use custodial staffing. Each school principal and site-based management team may choose to centralize their custodial services, thereby giving the Maintenance and Operations department full responsibility for all aspects of the housekeeping program; including budget, supplies and personnel concerns. In the event the principal and site-based management team chooses to retain control over facility maintenance, the budgets are decentralized and the principal is then responsible for all facility maintenance functions. When a principal retains control of the maintenance staff, the Maintenance and Operations department becomes a support function in training, monitoring the housekeeping program and providing general support where requested. By having the option of managing the custodial staff themselves or centralizing custodial services, each site-based management team can choose the option that best fits their management style, priorities and abilities. Both options for custodial services are similar in cost to the district. Approximately 60 percent of locations use centralized custodial services, with the remainder managed on-site.

The Maintenance and Operations department consists of five area directors who each have a custodial supervisor who works under their direction.

Exhibit 5-23 shows the organization for the custodial operations function.

Exhibit 5-23 **Organization for Custodial Services**

2000-2001 School Year



Source: FWISD Organization, updated January 16, 2001.

FINDING

FWISD's budgeted and actual costs for custodial supplies at schools are significantly less than the average for other districts in this region.

The spring 1999 *American School and University* study for U.S. Region 6, which includes Texas, suggests that custodial supply costs for school districts should fall between \$8 and \$10 per student annually. FWISD's budgeted cost for custodial supplies per student for 1999-2000 is \$5 per student and actual costs for the 1999-2000 school year were approximately \$7 per student, significantly lower than the suggested range. This can be attributed to two factors. First, custodial supplies and equipment are bid on an annual basis. Second, staff evaluates and tests all items for efficiency and effectiveness. This allows the district to select high-quality, cost-effective custodial supplies and equipment.

COMMENDATION

FWISD purchases custodial supplies at economical prices due to exemplary testing, evaluation and purchasing practices.

FINDING

FWISD has a stated standard of assigning custodial staff on the basis of one custodian per 20,000 square feet, which is consistent with industry best practice standards; however, current staffing exceeds this level.

Exhibit 5-24 analyzes FWISD's current staffing levels compared to the district's standard. This standard assumes that one-half of the head custodian's time is used in activities other than cleaning, such as supervision and minor maintenance. Therefore, 0.5 FTEs have been factored into the best-practice level of 1:20,000, and the best practice staffing level has been rounded to the next highest whole number when the calculation yields a decimal greater than 0.25.

Exhibit 5-24
Analysis of Custodial Staffing Levels*
2000-2001 School Year

School Name	Total Gross S.F.	Current Custodial Staff	S.F. per Custodian	District Standard (GSF/20,000 + 0.5)	Over (Under) District Standard
High Schools					
Amon Carter-Riverside	89,871	5	17,974	5	0
Arlington Heights	181,382	11	16,489	10	1
South Hills	120,501	8	15,063	7	1
Diamond Hill-Jarvis	91,430	7	13,061	6	1
Dunbar	178,809	10	17,881	10	0
Eastern Hills	188,333	12	15,694	10	2
North Side	126,540	11	11,504	7	4
Polytechnic	130,703	9	14,523	7	2
Paschal	235,440	16	14,715	13	3
Trimble Technical	217,451	14	15,532	12	2
Southwest	200,567	10	20,057	11	(1)
Western Hills	161,576	12	13,465	9	3

O D Wyatt	201,489	11	18,317	11	0
Accelerated	47,806	3	15,935	3	0
Metro Opportunity	19,350	2	9,675	2	0
Subtotals		141			18
Middle Schools					
Middle Level Learning Center	23,848	2	11,924	2	0
Horizons Alternative School	21,638	2	10,819	2	0
Daggett	62,530	5	12,506	4	1
Wedgewood Sixth Grade	33,516	3	11,172	3	0
Elder	157,391	9	17,488	9	0
Forest Oak	99,322	5	19,864	6	(1)
Dunbar Sixth Grade	65,100	3	21,700	4	(1)
Handley	73,008	5	14,602	4	1
William James	124,260	6	20,710	7	(1)
Kirkpatrick	63,900	4	15,975	4	0
McLean	96,966	6	16,161	6	0
Meadowbrook	69,909	5	13,982	4	1
Monnig	79,855	6	13,309	5	1
Morningside	80,866	6	13,478	5	1
Riverside	86,070	5	17,214	5	0
Rosemont	105,467	6	17,578	6	0
Dunbar	92,284	6	15,381	5	1
Wedgewood	107,452	7	15,350	6	1
Leonard	120,470	6	20,078	7	(1)
Glencrest	35,650	4	8,913	3	1
Subtotals		101			4

Elementary Schools					
Benbrook	43,168	4	10,792	3	1
I M Terrell	46,788	4	11,697	3	1
West Handley	29,500	3	9,833	2	1
Burton Hill	56,873	4	14,218	4	0
Carroll Peak	46,594	4	11,649	3	1
Carter Park	43,729	4	10,932	3	1
Manuel Jara	56,100	7	8,014	4	3
George C. Clark	54,050	5	10,810	3	2
Lily B. Clayton	41,187	4	10,297	3	1
Como	49,176	4	12,294	3	1
E M Daggett	89,314	7	12,759	5	2
Rufino Mendoza	54,098	3	18,033	3	0
De Zavala	55,158	4	13,790	4	0
Diamond Hill	48,940	4	12,235	3	1
S S Dillow	61,590	5	12,318	4	1
Maude I Logan	57,696	5	11,539	4	1
Eastern Hills	49,109	5	9,822	3	2
East Handley	35,739	3	11,913	3	0
Eastland	52,719	4	13,180	3	1
Harlean Beal	39,925	4	9,981	3	1
Glen Park	51,907	4	12,977	3	1
W. M. Green	46,583	4	11,646	3	1
Greenbriar	47,391	4	11,848	3	1
Van Zandt-Guinn	40,488	3	13,496	3	0
Hubbard Heights	26,907	3	8,969	2	1
H. B. Helbing	45,576	4	11,394	3	1
Milton L. Kirkpatrick	47,314	3	15,771	3	0
Meadowbrook	66,616	5	13,323	4	1

D. McRae	48,000	4	12,000	3	1
Mitchell Boulevard	52,230	4	13,058	3	1
M. H. Moore	58,840	3	19,613	4	(1)
Morningside	69,450	6	11,575	4	2
Charles E. Nash	28,250	3	9,417	2	1
Oakhurst	71,662	7	10,237	4	3
Natha Howell	43,075	3	14,358	3	0
Oaklawn	41,840	2	20,920	3	(1)
A. M. Pate	62,033	5	12,407	4	1
Mary Louise Phillips	42,393	4	10,598	3	1
Ridglea Hills	42,950	4	10,738	3	1
Versia L. Williams	37,490	4	9,373	3	1
Marjorie M. Walton	52,095	4	13,024	3	1
Sam Rosen	52,122	4	13,031	3	1
Sagamore Hill	28,103	4	7,026	2	2
Bruce Shulkey	49,134	4	12,284	3	1
R. J. Wilson	45,409	4	11,352	3	1
South Hi Mount	45,264	4	11,316	3	1
South Hills	52,848	4	13,212	3	1
Springdale	35,775	3	11,925	3	0
Sunrise	42,548	4	10,637	3	1
Tanglewood	37,817	3	12,606	3	0
W. J. Turner	54,123	5	10,825	3	2
Washington Heights	33,187	3	11,062	2	1
Waverly Park	49,234	4	12,309	3	1
Westcliff	48,401	4	12,100	3	1
Westcreek	58,914	5	11,783	4	1

Western Hills	44,138	5	8,828	3	2
Worth Heights	57,350	5	11,470	4	1
David K. Sellars	57,247	4	14,312	4	0
J. T. Stevens	58,002	5	11,600	4	1
Atwood McDonald	43,772	3	14,591	3	0
Bill Elliott	48,000	4	12,000	3	1
Westpark	46,594	4	11,649	3	1
T. A. Sims	62,400	5	12,480	4	1
Edward J. Briscoe	50,174	5	10,035	3	2
Woodway	46,594	4	11,649	3	1
Subtotals		279			62
Grand Total		521			84

Source: FWISD Buildings Inventory, 9/11/00, FWISD Custodial Staffing Report, 9/5/00 and Letter from Associate Superintendent for Non-Instructional Services to FWISD Board describing Custodian Staffing Levels, 7/17/96.

** Includes permanent and portable buildings.*

Recommendation 55:

Apply the district standard of at least 20,000 square feet per custodian consistently across all campuses.

As previously shown in **Exhibit 5-24**, FWISD is staffing its custodial operations with about 84 positions more than called for in the district's best practice model of a minimum of 20,000 square feet per custodian. This staffing level considers the age of facilities; with the expectation that newer facilities should achieve higher productivity levels. The staffing level should continue to be adjusted to account for a 0.5 FTE custodian that would not be used in cleaning activities, so that the head custodian can continue to perform supervision and minor maintenance duties.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Maintenance and Operations recalculates the staffing levels at each school using a revised formula.	June 2001
2.	The board reviews the staffing formula and staffing levels and approves the adjustments.	July 2001
3.	The director of Maintenance and Operations implements the new staffing levels by not filling vacant positions and establishing a hiring freeze until the staffing level is reached.	August 2001 - August 2004

FISCAL IMPACT

The fiscal impact of this recommendation will result in a total annual fiscal impact of \$2,256,828 after full implementation. This fiscal impact is calculated as follows: (average salary of a custodian III position \$20,130 x flexible benefits of 24.23 percent + fixed benefits of \$1,860 = \$26,867) x 84 positions. The reduction in staff should be achieved by attrition and a hiring freeze that will take about three years, assuming a turnover rate of 5 percent per year, or 28 positions each year. If the turnover rate is more than 5 percent per year, the district would realize more savings sooner. If the turnover rate is below 5 percent per year, the district should consider eliminating staff to reach the staffing formula and realize the associated savings.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Apply the district standard of at least 20,000 square feet per custodian consistently across all campuses.	\$752,276	\$1,504,552	\$2,256,828	\$2,256,828	\$2,256,828

FINDING

FWISD does not have a formal, regularly scheduled training program for its custodial staff. While the district does provide a mandatory training session for all new hires, there is no standardized custodial training program to improve work production and quality of cleaning for health purposes. By implementing a mandatory training program, the district will help provide custodial staff with the skills needed to increase efficiency, performance and achieve the district goal of 20,000 square feet per custodian. Other districts have established mandatory training programs for all custodians in the following areas:

- Efficient cleaning methods;

- Kitchen cleaning and sanitation;
- Restroom cleaning;
- Proper use of cleaning supplies and equipment;
- Time management;
- Hazardous materials;
- District policy review;
- Indoor environmental quality;
- Safety and health;
- Blood borne pathogen precautions;
- Repetitive stress injury prevention;
- Harassment and discrimination; and
- Cardiopulmonary resuscitation.

Recommendation 56:

Develop a comprehensive and mandatory training program for custodial staff.

The director of Maintenance and Operations should develop a comprehensive training program of eight hours per year of off-site training and eight hours per year of on-site training (16 hours annually) for the entire custodial staff, so that best-practice levels can be achieved for efficient cleaning methods and the efficient use of cleaning supplies.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Maintenance and Operations develops a comprehensive custodial training program and budget to implement the program.	June 2001
2.	The board reviews and approves the training program and budget.	July 2001
3.	The director of Maintenance and Operations, with the assistance of the custodial directors and supervisors, institutes the training program.	July 2001 - July 2002

FISCAL IMPACT

The Maintenance and Operations custodial directors and supervisors should conduct the training program so there are no training costs associated with this recommendation. The fiscal impact of this recommendation results from hiring substitute custodians to cover for employees attending off-site training sessions. This would cost the district about \$27,724 annually: 453 custodians (average over 5 years) x 8 (hours training annually) x \$7.65 (per hour for substitute) = \$27,724.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Develop a comprehensive and mandatory training program for custodial staff.	(\$27,724)	(\$27,724)	(\$27,724)	(\$27,724)	(\$27,724)

Chapter 5

FACILITIES USE AND MANAGEMENT

D. Energy Use and Management

The FWISD Energy Use and Management department is responsible for monitoring and managing energy use throughout all of the district's facilities. The Energy Use and Management program has three energy managers who report to the director of Central Services. These energy managers monitor utility use by entering monthly utility bills into a computer database and generating utility consumption/cost reports that help identify spikes in usage or utility rates. The energy managers also perform building walk-through energy audits to identify utility waste and work with school personnel to reduce utility costs.

FINDING

FWISD signed a four-year contract in May 1997 with Energy Education, Inc. at a cost of \$39,000 per month to provide a four-year energy management cost avoidance program. As part of this program, Energy Education has provided the district with the Fast Accounting Software for Energy Reporting (FASER) energy accounting software program and has trained the three energy managers that are employed by the district in the use of this software. Energy Education has also provided the energy managers with general training in energy conservation.

Exhibits 5-25 and **5-26** show the impact of the cost avoidance program over the last three years.

Exhibit 5-25
FWISD Energy Usage

Utility	1997	1998	1999
Electricity (KWH)	114,891,161	112,896,693	114,954,371
Natural Gas (MCF)	214,076	192,806	145,115
Water (CCF)	423,648	381,935	453,702

Source: FWISD Energy Use and Management Programs, 1999.

Exhibit 5-26
FWISD Energy Costs

Utility	1997	1998	1999
Electricity	\$8,765,176	\$8,424,434	\$8,549,958
Natural Gas	\$1,207,391	\$915,381	\$683,530
Water	\$1,138,087	\$1,307,738	\$1,236,379
Total	\$11,110,654	\$10,647,553	\$10,496,867

Source: FWISD Energy Use and Management Programs, 1999.

The base period for energy consumption and cost was established as November 1996 to October 1997. The FASER energy accounting software cost avoidance accounting process begins with the base period consumption, and adjusts to compensate for variations in weather, building additions and new construction, billing period lengths, additional technology and added new equipment. By making these adjustments, the software can then make an "apples to apples" comparison of the current year against the base year. **Exhibit 5-27** is a summary of the energy management cost avoidance program through October 1999.

Exhibit 5-27
Energy Management Cost Avoidance

Summary	
November 1998 to October 1999 Total Cost Avoidance	\$1,580,539
<i>Less Operating Costs:</i>	
Energy Education, Inc. Consulting Fees	\$(468,000)
Salaries for Three Energy Managers	\$(127,000)
Computer Costs	\$(5,000)
Miscellaneous Costs	\$(3,000)
November 1997 to October 1998 Net Savings (First Year)	\$595,057
Total Two Year Program Net Savings	\$1,572,596

Source: FWISD Twelve Month Energy Report, November 1998-October 1999.

As **Exhibit 5-27** shows, the cost-avoidance programs have saved the district approximately \$1,572,000 in energy costs since implementation.

COMMENDATION

The Energy Use and Management department has developed an effective energy management program that has realized a two year cost avoidance of over \$1.5 million.

FINDING

FWISD policies regulating temperature controls and energy management software are not implemented on a districtwide basis.

FWISD has a board policy requiring an energy management system that facilitates and enforces district policy for minimum and maximum temperature control in the heating and cooling seasons, as well as hours of operation. The district uses a Vision 20/20 software/modem-based energy management control system that reports building temperatures and trends; enables/disables main HVAC equipment and schedules run times for HVAC equipment. Only 60 to 70 percent of the school facilities within the district are part of the Vision 20/20 system. The district has advised that they intend to use the funds currently allocated for payments to the energy vendor (\$39,000 per month) for the replacement of aged HVAC equipment when the districts contract with them expires in May 2001.

Recommendation 57:

Implement district policies regulating temperature controls and energy management software on a districtwide basis.

The district should update or replace controls on HVAC systems to allow all HVAC equipment to be controlled by the Vision 20/20 energy management software. This work should be done in conjunction with upgrading or replacing HVAC equipment that is beyond its useful life cycle.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Central Services assigns responsibility to energy managers to develop a list of projects required to include all facilities in the energy management software.	June 2001
2.	The director of Central Services engages design firms for any work identified that cannot be performed by the district's work force.	July 2001 - July 2003
3.	The director of Central Services solicits bids for any work to be done by outside vendors.	July 2001 - July 2003

FISCAL IMPACT

The cost for controls will be included in the cost of the replacement HVAC systems. Savings from this recommendation are difficult to quantify because at the same time as the district will be bringing more existing HVAC systems controls into the Vision 20/20 software, new facilities from the bond program will also be added to the district's utility costs. The State Energy Conservation Office typically expects a payback period of four to eight years for energy upgrades. The district should expect a similar payback period for this recommendation.

FINDING

The energy management group does not have input into the HVAC systems selection for the bond projects or other new or replacement work.

Currently, HVAC systems are selected based primarily on systems suitable for the district's needs and most easily maintained by the district. Based on this selection process, the district has no way of knowing how these systems compare to other available systems from an energy efficiency and utility cost perspective. Ideally, HVAC systems for new construction, additions and renovations would be selected based on a number of factors, such as: initial cost, operating cost, energy efficiency, maintenance cost, controls and space requirements.

Recommendation 58:

Involve the energy management group in HVAC system selection.

Develop a matrix comparing different HVAC systems for issues such as: initial cost, energy efficiency, cost to operate, cost to maintain, controls systems, building space required, and noise and vibration to be used in selecting systems for new work and renovations. Provide additional training for HVAC maintenance staff if systems are selected that are new to the district.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Central Services assigns responsibility to energy managers to develop a matrix for HVAC system selection guide.	June 2001
2.	The energy managers develop a HVAC system selection guide matrix.	July 2001 - August 2001
3.	The associate superintendent for Non-Instructional Services issues a directive for energy managers to be included in the planning phase of all new construction, renovation and HVAC retrofit projects.	July 2001

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

The energy management group has not taken advantage of programs or training offered through the State Energy Conservation Office (SECO).

SECO offers programs specifically for school districts, including the Energy Education Outreach Program, Schools Energy Manager Training, Energy Efficient Partnership Program and Sustainable School Design, as well as low interest loans such as the LoanSTAR Revolving Loan Program and the Schools program. The programs offered through SECO would allow the district to realize further energy savings, provide energy education opportunities for students and energy managers and promote more energy efficient design for new and renovated facilities.

Recommendation 59:

Evaluate the programs offered by SECO, and participate in the programs beneficial to the district.

FWISD should participate in developing energy retrofit and HVAC replacement projects eligible for low interest loans with SECO. The district would be eligible for low interest loans through the Schools program and the LoanSTAR program, provided the payback period for the energy retrofit and HVAC replacement projects is between four and eight years. Additionally, the district should participate in the Energy Education Outreach Program in which SECO provides materials free of charge to educate students in energy efficiency and promote activities that instill an energy efficient ethic in all aspects of school operation.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Central Services reviews programs offered by SECO and identifies the programs that are most beneficial to FWISD.	June 2001
2.	The board reviews and approves FWISD's participation in the programs identified.	July 2001
3.	The director of Central Services assigns responsibility for implementation of specific SECO programs to each of the three energy managers.	August 2001 - July 2002

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

Chapter 6

ASSET AND RISK MANAGEMENT

This chapter of the report addresses the asset and risk management functions of the Fort Worth Independent School District (FWISD) in the following four sections:

- A. Cash and Investment Management
- B. Insurance Programs
- C. Fixed Assets
- D. Bond Issuance and Indebtedness

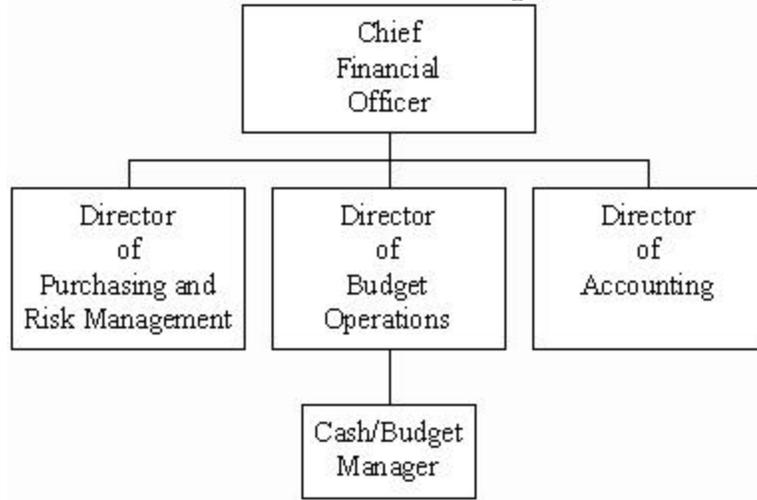
Texas school districts have a fiduciary responsibility to protect publicly financed assets provided to educate children. Cash, employees, land, buildings, equipment and borrowing capacity all are school district assets. The goal of asset and risk management is to protect these assets from financial losses resulting from unforeseen events.

An effective asset and risk management program aims to control costs by ensuring that the district is adequately protected against all significant losses with the lowest possible insurance premiums. This includes the identification and measurement of risk and techniques to minimize the impact of risk. Districts should seek investments with maximum interest earning potential while safeguarding funds and ensuring liquidity to meet fluctuating cash flow demands. Effective tax management includes quick and efficient tax collections to allow the district to meet its cash flow needs and earn the highest possible interest. Fixed asset management should account for district property efficiently and accurately and safeguard it against theft and obsolescence. The district's insurance programs for employees' health, workers compensation and district assets should be sound and cost effective to protect the district from financial losses.

BACKGROUND

All asset and risk management functions in FWISD are under the direction of the Chief Financial Officer (CFO). Asset and risk management, primarily insurance, is under the direction of the director of Purchasing and Risk Management. The director of Budget Operations manages the cash management function including the bidding of the depository contract, and the director of Accounting oversees fixed assets and bank reconciliations. The bond program is supervised by the CFO. All of these positions report directly to the district's CFO. The organization structure is detailed in **Exhibit 6-1**.

Exhibit 6-1
FWISD Reporting Relationships
For Asset and Risk Management



Source: FWISD Administrator Interviews.

Chapter 6

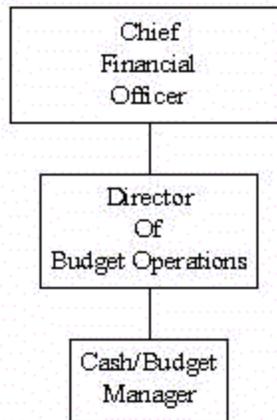
ASSET AND RISK MANAGEMENT

A. Cash and Investment Management

For a school district to achieve its instructional goals and objectives, cash and investments must be managed daily. Effective cash and investment management involves establishing and maintaining beneficial banking relationships, forecasting cash requirements accurately, and on a timely basis, so that funds are available when needed and maximizing returns on assets deposited in appropriate, approved and safe investment vehicles.

The FWISD board designates three investment officers for the district: the chief financial officer, the director of Budget Operations, and the Cash/Budget manager. FWISD's Cash/Budget manager has day-to-day responsibility for managing the district's cash and investments, and reports to the director of Budget Operations. The district uses an investment advisor, Patterson & Associates, to act as its funds manager for funds and securities. Its role is to manage, receive, maintain, disburse and invest monies and securities. **Exhibit 6-2** shows the positions and reporting relationships of the district's investment officers.

Exhibit 6-2
FWISD Investment Officers



Source: FWISD, Director of Budget Operations.

On a daily basis the Cash/Budget manager checks balances and initiates wire transfers as primary initiator. The director of Budget Operations is the required secondary initiator. He also supervises the cashier. He maintains investment spreadsheets, prepares cash and investment entries to the general ledger and verifies deposits. This is a stand-alone position. The director of Accounting and the chief financial officer can also serve as

secondary initiators in the absence of the director of Budget Operations. The director of Budget Operations prepares an annual cash forecast that is updated monthly. Accountants assigned to specific funds perform bank reconciliation on a timely basis. As of November 7, 2000 accounts had been reconciled through August 2000.

The cashier, a full-time position, processes checks after the switchboard operators receive mail and log all checks. This position also issues traveler's checks and cash for approved advance travel, sells stamps and cashes employee checks for up to \$100. This position also hands out vendor checks and missed payroll checks requiring personal ID verification. Schools that have missed the armored car pick up can bring deposits to the cashier for safekeeping in the vault. A second position will be added this year.

The district extended its depository agreement with Bank One for an additional two-year term from September 1999 through August 2001. The bank applies an earnings credit rate to available cash balances each month to compute the district's earnings credit. Accounts are analyzed and settled monthly. If earnings on the balances exceed the bank's monthly service charges, no service charge is due. If earnings are less than service charges, the deficiency is charged to the operating account each month. During 1999-2000 the net fees charged by the bank were \$109,713.

The district generates cash from three general sources: local, state and federal revenues. Property taxes represent the primary source of cash and are generated through tax assessments on local property values. During 1999-2000, cash generated from property taxes was 52 percent of cash receipts, revenues from state sources were 38 percent and the remaining 10 percent was from federal and other sources. Property tax collections peak in January. Approximately 18 percent of state revenues in 1999-2000 were received in September and 15 percent in October.

The district maintains 21 checking accounts for normal operations and one combined internal finance account for the 120 schools. School and student activity fund checking accounts are deposited in one account. These funds support school-based activities such as student clubs, bake sales, student councils and soft drink machines, and are maintained at the school level. On August 31, 2000, the district had \$183,717 in checking accounts.

Exhibit 6-3 summarizes funds held in checking accounts as of August 31, 2000 and describes each account's purpose.

Exhibit 6-3
FWISD Bank Accounts
As of August 31, 2000

Financial Institution	Account Name	Balance at August 31, 2000	Purpose of Account
Bank One	General Operating - Manual	\$0	Controlled disbursement account
Bank One	General Operating	\$4,534	
Bank One	General Operating - Computer	\$0	Controlled disbursement account
Bank One	Payroll	\$0	Clearing account - ZBA
Bank One	Payroll	\$0	Controlled disbursement account
Bank One	General Operating	\$0	Type 1 Clearing account - ZBA
Bank One	General Operating	\$0	Type 2 Clearing account - ZBA
Bank One	Internal Finance	\$65,763	School and campus activity fund accounts
Bank One	Debt Service	\$5,694	Interest and sinking fund
Bank One	Food Service	\$67,337	
Bank One	Food Service	\$0	Computer controlled disbursement account
Bank One	Food Service	\$0	School cafeteria deposits
Bank One	Insurance	\$0	Insurance funding account. Life and dental plan checks clear through this account
Bank One	Adult Education	\$8,805	Imprest account EXPLAIN IMPREST
Bank One	Workers' Compensation	\$0	Funds workers' compensation claims
Bank One	Series 1999 A Bond Fund	\$0	Controlled disbursement account
Bank One	Series 1999 A Bond Fund	\$11,537	Deposit
Bank One	Series 2000 Bond Fund	\$0	Controlled disbursement account
Bank One	Series 2000 Bond Fund	\$20,048	Deposit
	Total	\$183,718	

Source: FWISD Budget Operations Office.

The district uses a variety of investment vehicles to achieve its investment goals of safety, liquidity and maturity sufficient to meet anticipated cash requirements. The primary objectives of the district's investment policy, last updated in December 2000, are as follows:

SAFETY Safety of principal is the foremost objective of the investment program. Investments of the district shall be undertaken in a manner that seeks to ensure the preservation of capital in the overall portfolio at all times.

LIQUIDITY The district's investment portfolio will provide adequate liquidity to meet all debt service and operating expenses of the district as they arise.

YIELD The district's investment portfolio will be designed to obtain the maximum rate of return available within all legal, legislated and mandated investment guidelines, giving effect to the district's risk constraints and cash flow requirements.

As stated in the Comprehensive Annual Financial Report for the period ending August 31, 2000, the district had funds with a carrying, or fair value, of \$283.3 million in various investments allowed by its investment policy. **Exhibit 6-4** provides a description of the types of investment instruments in the district's portfolio, **Exhibit 6-5** summarizes the portfolio as of August 31, 2000 and **Exhibit 6-6** describes the types of investments in the portfolio managed by the outside investment advisor.

**Exhibit 6-4
Description of Investments**

Type of Investment	Description
Direct Obligations of the U.S. government	Direct obligations of the U.S. government, its agencies and instrumentalities with a stated maximum maturity not to exceed three years from the date of purchase. The total portfolio may contain up to a maximum of 80 percent in this type security.
Other U.S. Obligations	Other obligations, the principal and interest on which are guaranteed or insured by, or backed by the full faith and credit of the United States, with a stated maximum maturity not to exceed three years from the date of purchase. The total portfolio may contain up to a maximum of 60 percent in this type security.

Commercial Paper	Commercial paper that is rated, at time of purchase, not less than A1/P1 by at least two nationally recognized credit rating agencies, and with a maximum maturity not to exceed 180 days. The total portfolio may contain up to maximum of 15 percent in this type security.
Repurchase Agreements (Repos)	Agreement between two parties whereby one sells the other a security at a specified price with a commitment to repurchase it at a later date for another specified price. Most repos are overnight transactions.
Constant Dollar Government Investment Pools	As described in Sec. 2256.016 through 2256.019 of the Public Funds Investment Act as an investment pool that invests funds from government entities in authorized investments permitted by this subchapter.

Source: FWISD Investment Policy CPA (Local)-X Glossary of Investment Terms, 04/13/98.

**Exhibit 6-5
District Investments as of August 31, 2000**

Type of Investment	As of August, 2000
Commercial Paper	\$2,752,341
Repurchase Agreements	144,350,950
U. S. Government Agency Obligations	52,557,213
U. S. Treasury Obligations	7,475,260
Local Government Investment Cooperative	30,382,660
State Treasurer's Investment Pool	45,793,979
Total	\$283,312,403

Source: FWISD Comprehensive Annual Financial Report for the fiscal year ended August 31, 2000.

**Exhibit 6-6
Portfolio Managed by Investment Advisor**

Type of Instrument	Book Value on September 30, 2000	Percent of Portfolio
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U.S. Agencies*	\$49,240,955	76.6%
T-Notes*	\$7,456,855	11.6%
Commercial Paper*	\$1,542,798	2.4%
Repos*	\$578,549	0.9%
Disco*	\$5,464,075	8.5%
Total	\$64,283,232	100%

Source: FWISD September 30, 2000 Investment Report.

In 2000, the district earned \$16.9 million in interest.

FINDING

FWISD uses six controlled disbursement accounts (CDAs) to reduce the amount of cash in non-interest bearing accounts. Controlled disbursement is a feature designed to provide disbursement totals early enough each day to satisfy cash needs in CDA accounts. Each business day the Cash/Budget manager receives an online bank report showing the checks presented for payment that day. He then transfers funds into the accounts sufficient to honor the checks and to bring the account balance to zero. FWISD also uses three zero balance accounts (ZBA's). A ZBA account consolidates balances so that the controlled disbursement accounts can be used to transfer funds to a smaller number of similar accounts. After the day's activity, the nominal balances in these ZBA accounts are rolled into a control account. FWISD uses both types of accounts in its cash management strategies.

COMMENDATION

Using controlled disbursement accounts (CDAs) to efficiently handle daily cash needs enables FWISD to save money by reducing the amount of cash in non-interest bearing accounts.

FINDING

The district's use of an outside investment advisor to manage its investment portfolio reduces costs, and provides an independent and professional resource to support the cash management activities of FWISD.

The investment advisor acts as FWISD funds manager to manage, receive, maintain, disburse and invest funds. As of September 30, 2000 all funds except bond flex repurchase agreements and funds maintained in

TEXPOOL and LOGIC pools were included in this portfolio. The investment advisor provides a daily holdings report that indicates the position of the portfolio by individual investment as well as summary information on maturities, security types and daily yield rates. Information on any trade, including competitive offers, is provided on every transaction on a daily basis. The advisor provides monthly reports to FWISD management that include positions by investment, portfolio breakdown, accounting report, book value reconciliation, transactions and maturities and coupons and performance benchmarks. The advisor prepares quarterly consolidated reports to the board that include summary information on all FWISD investments such as changes in position and performance information.

The cost of this service was approximately \$84,000 for 1999-2000 based upon a fee of 0.15 percent of the total monthly balances. Professional services allow the district to operate its cash management function in a cost effective manner using less staff. Other large districts that recently have been reviewed by TSPR, including San Antonio, Fort Bend and Austin, used more in house staff to manage this cash management function. **Exhibit 6-7** describes the cash management staffing in these districts. Outside investment management services also provide an independent resource that, while monitored by FWISD staff, provides information on a daily, monthly and quarterly basis.

**Exhibit 6-7
Comparison of Cash Management Staffing**

District	Cash Management Staffing
Austin	Treasurer and 2 staff positions
Fort Bend	Controller and assistant controller
San Antonio	Director and four clerical positions
Fort Worth	Manager

Source: TSPR Management and Performance Reviews of Austin, San Antonio and Fort Bend.

COMMENDATION

Using an outside investment advisor to manage its investment portfolio reduces costs and provides an independent and professional resource.

FINDING

FWISD's board policy requires that the Internal Audit department conduct audits of the district's investments activities, including reviewing the quarterly reports provided to the board. However, according to the internal auditor, there have been no internal audits of investment in recent years as the internal audit function focuses primarily on school activity funds. No audits are planned in the future.

In FWISD, an outside investment advisor prepares daily, monthly and quarterly reports which are reviewed daily by the Cash/Budget manager and monthly by the director of Budget Operations and the chief financial officer. Quarterly reports are reviewed and formally approved by the investment advisor, the Cash/Budget manager, the director of Budget Operations and the chief financial officer. Also investments are reviewed as part of the external audit on an annual basis.

The lack of independent review during the year constitutes a potential risk to the district and leaves the district open to criticism for not following its own policy. Good practice includes the consideration of investment risk as part of the development of an internal audit work plan.

In the Comptroller's investment guide for districts, *Banks to Bonds: A Practical Path to Sound School District Investing*, the issue of managing investment managers is addressed as follows:

"Regular monitoring of the contract is critical. Designate someone to be responsible for monitoring the contract. Establish regular contact with the expert. The Public Funds Investment Act requires quarterly progress reports to the board. In addition, the Act requires that the district, in conjunction with its annual financial audit, perform a compliance audit of management controls on investments and adherence to the district's investment policy. Provide for termination of the contract in cases of non-compliance or poor results."

The investment guide concludes with this advice:

"No matter what services are acquired, a district should never relinquish total control over its investments or debt issues. And the use of an expert to assist the district does not relieve the district of the responsibility for monitoring its investments to ensure they are in compliance with the investment policy. In the long run, it will be the district that is held accountable by the public.

The primary goal of any school district's investment strategy is to obtain a reasonable market rate of interest on all investments, without putting the

district's assets at risk. Accomplishing this goal requires a great deal of planning and expertise-expertise that many smaller and some larger districts may not possess."

Recommendation 60:

Perform annual internal audits of investment activities and quarterly reports.

The district should modify its internal audit work plan to include both a review of the quarterly investment reports and a review of the investment process as appropriate based upon a risk analysis of district operations. As part of that risk analysis, the chief financial officer should make a determination regarding the effectiveness of a quarterly review of investment reports by internal auditors in addition to the review done by the Office of Budget Operations.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The internal auditor begins following board policy by reviewing quarterly investment reports.	June 2001
2.	The internal auditor performs a risk analysis of the investment program as part of an overall risk assessment.	July 2001
3.	Based upon that analysis, the internal auditor schedules an internal audit of the investment program.	September 2001
4.	Based upon the results of the internal audit, the chief financial officer recommends continuance of the current board policy or modification.	November 2001

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The district does not have internal controls documented, as required, to satisfy its board investment policy. Policy CDA (LOCAL) Other Revenues: Investments requires that the district establish and document a system of internal controls that includes specific procedures designed to prevent loss of funds arising from fraud, employee error, misrepresentation by third parties, unanticipated changes in financial markets, or imprudent actions by employees or the board. The Comptroller's guide for school district investment addresses this issue:

"In the investment process, the Board of Trustees and administrators of a school district are called upon to analyze the issues and make decisions on the direction the district will take. They are responsible for policies, strategies and reporting to the public. To support the board's policy and intent requires written procedures that will implement those directives and control risk. Administrative controls must be in place to ensure that all policies, rules and laws are being followed.

Many mistakenly believe that policy is procedure, but nothing could be further from the truth. Policy sets broad objectives and guidelines to define the board's intentions and procedures establish the steps necessary to fulfill those intentions. Procedures create a system of internal controls to ensure that no one deviates from that plan of action. Given the large amounts of public money involved in investing, a district cannot allow the stipulated policy to go unheeded. Reports of misappropriated funds and financial problems in districts are usually accompanied by reports of someone who was allowed to circumvent the system."

Recommendation 61:

Develop investment procedures that include a discussion of the control activities necessary to ensure that management's objectives for safeguarding district investments are met.

The district should develop investment procedures that expand board policy and include a discussion of the control techniques that ensure district investments are properly authorized, recorded, reported and safeguarded. The procedures should emphasize how:

- Authority for initiating and consummating investment transactions is delineated;
- Critical investment duties are segregated;
- Collusion is avoided;
- Investments are kept secure;
- Custodial functions are segregated from record keeping functions;
- Transactions are confirmed, reconciled and documented; and
- Only authorized securities are purchased.

The district's internal auditor should review the investment procedures as indicated by a risk analysis.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer instructs the director of Budget Operations to develop internal control procedures as specified in board policy.	June 2001
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2.	The director of Budget Operations, working with the Cash/Budget manager and the investment advisor, develops internal control procedures.	July 2001
3.	The chief financial officer approves and implements the internal control procedures.	August 2001

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 6

ASSET AND RISK MANAGEMENT

B. Insurance Programs

The district's insurance programs consist of group health care and employee benefit plans, workers' compensation insurance and property and casualty insurance. FWISD's Purchasing and Risk Management director has overall responsibility for employee health insurance and benefits, workers' compensation insurance and property casualty insurance. The director of Purchasing and Risk Management reports to the chief financial officer. The director manages these programs using outside contractors for workers' compensation claims processing and benefit counseling. The district has a health insurance committee comprised of approximately 17 representatives of unions and associations. The committee meets at least three times a year to discuss and provide input on health insurance issues and benefit changes.

The district offers a variety of benefit plans to its employees. Employees are offered medical coverage, disability insurance, vision coverage, life insurance and dental coverage. Employees may use a flexible spending account. **Exhibit 6-8** provides an overview of the various types of benefits provided to district employees and shows the number of employees enrolled in each plan.

Exhibit 6-8
Overview of Benefit Plans and Enrollment
2001

Plan	General Description	Number of Enrollees	Employee Monthly Premium
Health Plan	Makes health care available through a network of health care providers and offers a prescription drug plan.	7,370	\$20.32 employee only to \$351.53 full family
Alternate Health Plan	Point of service provider program.	430	\$54.16 employee to \$408.03 full family
Disability	Pays monthly income if employee becomes disabled and is unable to work. This benefit is integrated with the district's workers'	3,038	\$2.15 to \$236.00 depending on age and plan value

	compensation program.		
Dental	Offers fee-based care through a network of providers. Or employee may use any provider through an indemnity plan option but will pay a specified percentage of expenses after a deductible.	4,445	\$8.52 employee only to \$21.00 full family
Vision	Provides benefits for primary vision care through a national network of providers at a savings of 20 to 60 percent.	1,800	\$1.50
Life and Accidental Death & Dismemberment	Provides a lump-sum benefit to beneficiary if employee dies. Also provides benefits if employee loses a limb in an accident.	1,231	Basic life policy of \$5,000 is provided by the district at no cost. \$.093 to .973 per \$1000 for coverage depending on age.
Section 125 Flexible Spending Accounts	Allows employee to set aside pre-tax dollars for unreimbursed medical, orthodontia and dependent care expenses.	421	Free

Source: 2001 Benefits Overview and the director of Purchasing and Risk Management.

The district's health care plan is self-funded, meaning the district assumes the risk of loss and pays all claims rather than paying an insurance company to assume the risk. Although the district pays the claims, it contracts with a third party administrator to manage and administer the claims. The third party administrator, CIGNA HealthCare Plans, provides all the necessary elements of a commercial plan including administrative services, claims administration, utilization management, payment agent, preferred provider credentialing, claims audits and employee satisfaction surveys. The district also maintains a stop-loss policy with a threshold of \$150,000 that limits the district's liability on an individual's specific illness or accident.

The CIGNA contract is for three years beginning January 1, 2000, during which time rates for services are guaranteed. Cigna HealthCare administers a health maintenance organization (HMO) styled plan and offers a point-of-service (POS) health plan. The district has written performance standards into its contract with CIGNA. These standards are designed to ensure efficient, accurate and timely claims administration. They include member service standards, eligibility determination standards and claims processing standards. During the year ending August 31, 2000, employees of the district were covered by Nycare Health Plans of the Southwest through December 1999 and by Cigna HealthCare beginning January 1, 2000. The district contributed premiums of \$116 per month per employee increasing to \$155 per month per employees in December 2000. Nycare is a health maintenance organization wholly owned by an insurance company, New York Life. **Exhibit 6-9** describes costs of operations for 1998-2000.

**Exhibit 6-9
Insurance Fund Operations
1998 through 2000**

	1997-98	1998-99	1999-2000
Revenues			
Received from Contributions	\$24,084,648	\$25,712,572	\$27,924,382*
Other Operating Revenue			2,782,894*
Total Operating Revenues	24,084,648	25,712,572	\$30,707,276
Expenses			
Purchases & contracted services			27,398,235*
Other operating costs	21,038,961	24,583,128	1,946,060*
Total Expenses	21,038,961	24,583,128	29,344,295
Net Income (Loss)	3,045,687	1,129,444	1,362,981
Fund Balance September 1	6,022,591	9,068,278	10,197,722
Fund Balance August 31	\$9,068,278	\$10,197,722	\$11,560,703

*Source: FWISD 1998-2000 Comprehensive Annual Financial Reports.
In 1999-2000, Internal Service Fund further detailed.

Since 1998, total health care costs per enrollee have increased 19 and 17 percent per year. Factors driving these increases include increased use of the plan and inflation, particularly with respect to prescription drugs.

The district's workers' compensation program has been self-funded since September 1977. Workers' compensation costs are accounted for in the internal service fund. The fund accounts for contributions, premiums, claim expenses and administrative costs of the workers' compensation program. Catastrophic loss protection is provided by a commercial carrier for the claims in excess of \$1 million for any occurrence. A third party administrator provides claims processing on site at FWISD and management reports.

Workers' compensation fund operating expenses have increased since 1998. For example, 1998 claims paid totaled \$5.8 million. By the end of 1999, claims paid had increased 39 percent to \$8.0 million. The district's fiscal liability also increased slightly over the same period from 3.4 percent to 3.6 percent. **Exhibit 6-10** provides a three-year overview of operating results for the workers' compensation fund.

Exhibit 6-10
Workers' Compensation Fund Operations
1998 through 2000

	1997-98	1998-99	1999-2000
Beginning of Fiscal Year Liability	\$11,566,721	\$10,751,117	\$11,809,086
Current-Year claims and Changes in Estimates	4,967,052	7,130,479	9,442,140
Claim Payments	5,782,656	6,072,510	8,022,227
End of Fiscal Year Liability	\$10,751,117	\$11,809,086	\$13,288,999
Total Payroll	\$316,304,418	\$336,277,550	\$368,330,118
Percentage of Payroll	3.4%	3.5%	3.6%

Source: FWISD Fiscal 1998-2000 Comprehensive Annual Financial Reports and AEIS budgeted payroll amounts.

The third party administrator provides the district with claims data and loss statistic reports. This information assists the district with managing and monitoring its workers' compensation claims. Since 1998, the district has averaged 1,044 claims per year at an average incurred cost of \$5,252 per claim. Over the same period, the number of claims grew almost 6 percent, from 995 to 1,051 claims, while costs per claim increased 14 percent from \$4,978 to \$5,678.

As would be expected, teachers, the single largest worker classification, experienced the most workers' compensation incidents. Teachers filed an average of 370, or 35 percent, of the workers' compensation claims since 1998 at an average cost of \$3,832 per claim.

Exhibit 6-11 presents the number of claims and incurred costs per claim by worker classification since 1998.

Exhibit 6-11
FWISD Workers' Compensation Claims and Incurred Costs per Claim
1998 through 2000

Worker Classification	1997-98		1998-99		1999-2000	
	Number of Claims	Incurred Cost Per Claim	Number of Claims	Incurred Cost Per Claim	Number of Claims	Incurred Cost Per Claim
Food Service	133	\$5,138	135	\$5,558	129	\$4,823
Transportation	128	11,245	159	9,544	119	14,044
Custodial	76	5,856	99	7,677	86	6,949
Teachers	397	3,547	357	2,520	355	4,487
Teacher Aides	53	4,293	111	4,985	111	4,579
Operations	49	7,566	60	2,885	74	4,348
Administrators	29	816	20	11,495	14	6,833
Other	130	2,736	144	4,540	163	3,396
Total	995	\$4,978	1,085	\$5,059	1,051	\$5,678

Source: FWISD Workers' Compensation Claims Reports Fiscal 1998 through 2000.

FWISD's workers' compensation experience does not compare favorably to its peer districts. As shown in **Exhibit 6-12**, FWISD has paid an average cost per claim significantly higher than most of its peer districts. **Exhibit 6-13** shows that since 1998, FWISD experienced, on average, about 7.2 claims for every 100 employees, which is more than the peer average. This comparison is made using the number of year-end wage statements (W-2s) issued as a measure of the number of employees. This measure is more accurate because any employee hired by the district

during the year could potentially have filed a claim during his or her time of employment.

Exhibits 6-12 and 6-13 compare FWISD and peer district loss statistics.

Exhibit 6-12
Workers' Compensation Claims and Incurred Cost per Claim
FWISD and Peer Districts-Fiscal 1998 through 2000

District	Three-year Average		Three-year Annual Rate of Growth (Decline)	
	Number of Claims	Incurred Cost Per Claim	Number of Claims	Incurred Costs per Claim
Austin	697	\$3405	5.3%	22.0%
Dallas	2,339	3,035	(4.0%)	(32.4%)
Houston	1,573	7,371	44.4%	(30.2%)
Peer Average	1,536	4,604	15.2%	(23.5%)
FWISD	1,044	\$5,252	5.6%	14.0%

Source: FWISD Workers' Compensation Claims Reports Fiscal 1998 through 2000 and peer surveys

Exhibit 6-13
Comparison of Loss Statistics-FWISD and Peer Districts
Fiscal 1998 through 2000

District	Three-year Average	
	Claims per 100 W-2s Issued	Incurred Cost per \$100 of Payroll
Austin	5.0	\$0.76
Dallas	9.5	\$0.94
Houston	5.0	\$1.34
Peer Average	6.5	\$1.01
FWISD	7.2	\$1.61

Source: FWISD Workers' Compensation Claims Reports Fiscal 1998 through 2000 and peer surveys.

The director of Purchasing and Risk Management is responsible for obtaining and maintaining the district's property and casualty insurance coverage. Property and casualty insurance includes coverage for facilities, vehicles, equipment, personal injury and professional and general liability. **Exhibit 6-14** provides a detail of property and casualty policies currently in force.

**Exhibit 6-14
FWISD Property Casualty Coverage**

Type of Coverage	Insurer	Description of Limits and Deductibles	Policy Expires	Premium Amount
Automobile Liability and Physical Damage	Wausau Insurance	Carries bodily injury liability limit of \$100,000 per person and \$300,000 per accident. Property damage limit is \$100,000. Deductible for bodily injury and property damage is \$1,000.	10/01/01	\$208,777
Real and Personal Property	Indemnity Insurance Company of North America	Coverage for buildings is written on an all-risk basis with a per occurrence limit of \$250,000,000 with various sub-limits. Deductible is \$100,000 per occurrence. Valuation is based upon actual cash value.	10/01/01	\$389,940
Commercial Equipment coverage	Chicago Insurance Company	Provides coverage for scheduled equipment including tractors, mowers, forklifts, and band instruments. Deductible is \$1,000.	10/01/01	\$9,008
Public Employees Blanket Bond	The St. Paul	Crime coverage is provided at a \$250,000 limit per employee and includes employee dishonesty, faithful performance and money and securities coverage. Deductible is \$5,000 per occurrence. The policy also provides \$100,000 limit per loss defined as theft.	10/1/01	\$13,661

		disappearance or destruction of moneys or securities. Deductible is \$1,000. Public officials bond provides \$400,000 limit for CFO/associate superintendent, controller, assistant controller and tax collector.		
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Source: FWISD's director of Purchasing and Risk Management.

FINDING

In spite of general increases in health care costs, FWISD's health care premiums compare favorably to those of its peer districts.

Benefits plans are difficult to compare because of their diverse features. Employee demographics, regional health care considerations, availability of providers, specific plan features, type of plan and claims experience all play a significant role in the determination of plan costs and benefits. However, district contributions toward employee coverage as well as employee costs per coverage category for similar types of plans can be compared.

North East ISD conducts an annual survey of school district employee benefits programs. The 2000 survey included 56 school districts. While FWISD has participated in the past, the district did not participate in this year's study. When compared to urban district plans with 3,000 or more enrollees, FWISD's contribution to employee coverage was 9.54 percent higher than the group average. FWISD employees contributed 42 percent less than the group average for employee-only coverage. FWISD employee contributions for the employee and family category were 3.67 percent more than the group average. **Exhibit 6-15** presents a summary of North East ISD's survey results. The survey was conducted in the spring of 2000, which makes FWISD comparison more favorable as insurance premiums have risen over the past year.

**Exhibit 6-15
Summary of North East ISD 1999 Survey Results
Selected Districts-Self-funded Basic Service Plans with 3,000 or More
Enrollees**

Coverage Category	Employees' Cost		Ratio of FWISD to Group
	Group Average	FWISD	

Employee Only	\$35.22	\$20.32	(42.3%)
Employee & Family	339.10	351.53	3.6%
District's Contribution	141.5	155.00	9.5%

Source: North East ISD 2000 School District Benefit Survey and FWISD director of Purchasing and Risk Management.

Exhibit 6-16 compares FWISD and peer district health plan costs. FWISD's basic health plan total monthly premium for employee only coverage is lower than any of its peers except Austin. FWISD's basic plan for employee and spouse is also the second lowest of the peer districts.

Exhibit 6-16
Comparison of Health Plan Costs
FWISD and Peer Districts

Type of Plan	Average Monthly Employer Contribution	Total Monthly Premium			
		Employee Only	Employee and Spouse	Employee and Children	Employee and Family
Austin					
-Amil HMO	\$154.00	\$154.00	\$364.67	\$320.17	\$488.95
-Amil PPO	\$154.00	\$207.16	\$490.56	\$430.69	\$657.74
-NYLCare/Aetna HMO	\$154.00	\$162.79	\$385.50	\$338.45	\$516.87
-NYLCare/Aetna PPO	\$154.00	\$211.47	\$500.76	\$439.65	\$671.42
Dallas					
-Basic HMO	\$178.00	208.00	449.28	393.74	512.93
-Bonus HMO	\$178.00	234.73	507.01	444.34	578.84
-POS in-Network	\$178.00	349.00	753.84	660.66	860.63
-POS Out of Network	\$178.00	\$349.00	753.84	660.66	860.63
El Paso					
-Basic	\$220.00	0	211.06	151.80	362.90
-Select	\$220.00	220.00	521.11	447.00	710.88
Houston					
-HMO	\$172	\$216.00	\$432.00	\$421.00	\$609.00
	individual	\$194.00	\$386.00	\$377.00	\$543.00
-PPO	and \$245	\$180.00	\$357.00	\$349.00	\$501.00
	other	\$288.00	\$587.00	\$422.00	\$830.00
	\$172				
	individual				

	and \$245 other				
Fort Worth Standard Provider Program	\$155.00	\$175.32	\$419.37	\$349.65	\$506.53
Point-of-Service	\$155.00	\$199.16	\$458.95	\$427.73	\$563.03

Source: Fiscal 2000 Benefit Plan Enrollment Guide and Peer District Surveys. Austin Information from TSPR Report.

FWISD has employed a number of strategies to control the overall cost of health care. For example, the district bids health insurance every three years and requires agency service agreements for brokers and agents placing district insurance coverage. These agreements define the duties and responsibilities of the agents. In addition, the district contracts directly with medical providers, which allows input into the rate setting process. FWISD's health plan benefits also are on par with the peer districts. **Exhibit 6-17** compares key features of FWISD's health plan to those of its peers.

**Exhibit 6-17
Comparison of Key Health Plan Features
FWISD and Peer Districts**

Type of Plan	Deductible	Co-Payments*	Maximum Annual Out of Pocket	Drug Co-pay**
Austin				
-Amil HMO	None	\$10-\$75	\$0	\$25 NF, \$15 BN, \$5 GR
-Aetna HMO	None	\$10-\$40	\$0	\$10 BN, \$5 GR
-Amil PPO	None	\$10-\$75-	\$1K-Ind., \$2K-Fam.	\$25 NF, \$15 BN, \$5 GR
-Aetna PPO	\$300-Ind., \$600-Fam.	10% \$10-10%	\$1.3K-Ind., \$2.6K-Fam	80 percent after \$50 annual deductible per insured
Dallas				
Basic HMO	None	\$20	\$2000	\$10/\$20/\$30
Bonus HMO	None	\$15	\$850 for employee /\$2000 for all other	\$10/\$20/\$30
POS in-Network	None	\$15	\$850 for employee /\$2000 for all other	\$10/\$20/\$30
POS Out of Network	\$500/\$1,500	30%	\$2,500 for employee / \$5000 for all other	\$10/\$20/\$30
El Paso				
-Basic	None	\$10	\$1,000/\$3,000	\$5/\$60
-Select	\$250/\$750	\$20	\$2,000/\$6,000	\$10/\$80

Houston -HMO -PPO	None \$250/\$1,000	\$10/\$15/\$20 \$15	\$1,500 individual and \$3,000 family \$2,000/\$8,000	\$10/\$20 \$10/20
Fort Worth Standard Provider Program Point of Service	None	\$20	\$0	\$10/\$15/\$35
	None	\$20	\$0	\$10/\$15/\$35

Source: Fiscal 2000 Benefit Plan Enrollment Guide and Peer District Surveys. Austin information from TSPR report.

** Percentages refer to portion of the cost of certain services paid by the employee up to a specified maximum.*

*** NF=Nonformulary, F=Formulary, BN=Brand name, GR=Generic.*

The district provides good support and communication in managing employee benefits. The benefit program has several exceptional features:

- The vendors give presentations during the new employee orientations.
- The account executives go to schools to answer employee questions.
- The plan maintains stability for the employees by contracting with the vendors for an extended period of time.
- The benefits department takes exceptional measures to contact employees during open enrollment, including personal phone calls.
- The benefits plan allows for automatic continuation of benefits if the employee does not attend open enrollment.

In addition, the benefits personnel make personal telephone calls to employees, as needed, to encourage employees to participate in open enrollment. These activities go well beyond the efforts of most organizations and provide substantial support for the employees.

COMMENDATION

FWISD has successfully managed health plan costs while offering comprehensive health care benefits to its employees.

FINDING

FWISD does not use prevention and training strategies to manage costs in the workers' compensation program. As seen earlier in **Exhibits 6-12 and 6-13**, FWISD's workers' compensation costs compare unfavorably to its peer districts. There is no districtwide safety program, and safety training is provided only to support function staff such as food service workers and bus drivers. Teachers and teacher assistants receive no safety training, although these groups contributed 44 percent of all claims in 1999-2000.

The Fort Bend ISD reduced workers' compensation losses through the initiatives of its Workers' Compensation Task Force, a group composed of department heads and supervisory personnel representing the Transportation, Facilities, Child Nutrition, Risk Management and Human Resources departments. The workers' compensation systems coordinator, an individual contracted through the district's third party administrator, Ward North America, formed the task force in 1997 to spearhead the district's workers' compensation loss control programs. The mission of the task force is to ensure that: "the workers' compensation program at FBISD will be a win-win proposition for the district, operating departments, and most importantly, the injured employees."

In that district, the committee established seven guiding principles during its organizational meeting in 1997. These principles are presented in **Exhibit 6-18**.

Exhibit 6-18 **Seven Guiding Principles**

1. Authority and responsibility to handle employees lie within the department.
2. Employees are responsible for reporting work status and maintaining attendance and performance standards.
3. Risk Management will act as a consulting entity.
4. Restricted/Modified duty will serve as a temporary measure to aid in the healing process, if the employee is expected to return to full-duty status within a reasonable time period.
5. Employees who are not able to return to work because of permanent restrictions will be assisted with vocational rehabilitation services. They will also be given the opportunity to apply for jobs within the district for which they qualify by reason of training and physical ability.
6. The district will thus be able to save dollars in medical/indemnity and personnel replacement costs.
7. The injured employee will benefit by maximizing return to work options with minimal (if any) impact on income.

Source: Workers' Compensation Guidelines, A Win-Win Approach.

The task force developed and implemented safety initiatives that successfully controlled claims and lowered costs. Since 1997, the number of claims has risen only slightly, averaging around 431 claims per year. However, after peaking at \$5,344 per claim in 1996, costs per claim fell steadily to a five-year low of \$2,395 in 1999. This decline translates into total savings since 1996 of \$1.2 million, or \$407,500 annually.

Examples of the task force's initiatives include reviewing and revising workers' compensation guidelines and procedures, shifting authority and responsibility for safety to supervisors and supporting them with training programs, and involving employees in safety initiatives. Employee involvement has played a significant role in reducing accidents. For example, accident investigation committees are made up of employees who investigate accidents and report findings to management and central administration. Accident investigation committees help raise safety awareness among employees and offer them a stake in reducing accidents and lowering costs. The following are other cost containment activities of the Fort Bend ISD Workers' Compensation Task Force and Risk Management.

- Conducted periodic case meetings to discuss and troubleshoot difficult cases.
- Revised job descriptions for injury-prone positions to describe the physical requirements of the position.
- Modified the injury report form to allow for injury investigation.
- Developed a light duty program.
- Conducted training for more than 250 supervisors using material from a world-leader in employee development.
- Completed an employee morale survey designed to measure supervisory effectiveness before and after training (happy employees are safer employees).
- Changed service providers resulting in lower costs and better service.
- Trained supervisors using Dupont's Safety Training Observation Program (STOP), a program designed to enable supervisors to recognize and eliminate unsafe behavior and conditions.
- Conducted post-offer, pre-employment physical ability exams.
- Implemented the Progressive Discipline Program, a program designed to train supervisors in progressive discipline techniques (high-quality employees are safer employees).
- Conducted annual claims audit of the TPA.
- Improved workers' compensation claims closure rates. Claims that are managed and closed quickly do not usually develop into more serious, expensive claims.

Recommendation 62:

Establish a task force to initiate a program to reduce workers' compensation program costs.

Using the example of best practices in Fort Bend ISD, the district should establish a task force to effectively initiate a districtwide loss control program. The district may want to consider using an outside consultant or contracting with its current third party administrator to perform a detailed analysis.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent establishes a task force with participants from all areas of the school district. He also designates the director of Purchasing and Risk Management as leader.	June 2001
2.	The taskforce analyzes the current claims and develops a program to control losses. The task force may need to contract with an outside consultant to conduct study of current losses.	July 2001
3.	The superintendent approves and implements the plan.	September 2001
4.	Training is provided, at a minimum, for teachers and teacher aides.	October 2001

FISCAL IMPACT

Fort Bend's savings of 55 percent may not be achievable for an urban area like Fort Worth, but savings of 20-25 percent may be possible. Savings were conservatively estimated at 20 percent of the 1999-2000 claim costs for teachers and teacher aides. The annual savings would be \$420,231 [(355 claims for teachers x \$4,487 per claim x 20 percent) + (111 claims for teacher aides x \$4,579 per claim x 20 percent)]. One half of that amount is possible during the first year with increased training and awareness.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Establish a task force to initiate a program to reduce workers' compensation program costs.	\$210,115	\$420,231	\$420,231	\$420,231	\$420,231

FINDING

FWISD does not screen employees to determine if they are physically capable of performing the work required for the position for which they

are hired. Overall workers' compensation costs could be reduced if the district screened employees after the job is offered but prior to actual placement on the job.

The review team looked at back injuries over the past three years. These are the types of injuries that would most likely be detected in the screening process. **Exhibit 6-19** shows that over the past three years FWISD has paid an average of \$667,979.72 in claims each year for back injuries. The largest individual claim incurred each year in this category were as follows: 1997-98 - \$154,384, 1998-99 - \$99,997 and 1999-2000 - \$82,212.

**Exhibit 6-19
Back Injuries**

Year	Back Claims	Back Injury Costs
1997-98	111	\$744,046
1998-99	119	662,222
1999-2000	99	597,671
Average	110	\$667,980

Source: FWISD director of Purchasing and Risk Management.

Other districts have implemented programs proven to be successful at reducing workers' compensation claims and costs. Programs typically require potential employees to undergo post-offer, pre-employment screenings to determine whether they could meet the physical demands of the job. Post-offer, pre-employment screenings are physical ability tests given to job candidates after an offer of employment but before job placement. The cost of the screenings was \$75 per person. Districts required screenings of applicants in the Transportation, Child Nutrition, Custodial and Operations departments, and contracted with an outside vendor to test an applicant's ability to carry, push, pull, lift and stack various objects. The screening also tested certain applicants such as school bus operators for bending, reaching, turning and sitting. Applicants who passed were placed in the job. Those who failed were not placed because they represented a higher risk of sustaining a workers' compensation injury.

During a one year period the program in Fort Bend ISD showed that 55 of 414 applicants, or 13.3 percent, failed. According to an analysis of incidents occurring after post-offer, pre-employment screenings ended, the program had a positive effect on the district's claims experience. The district hired a loss control consultant to analyze sprain/strain accidents that occurred between September and December of 1997, 1998 and 1999.

The consultant compared the losses occurring in September - December 1998, the period screenings were required, to losses occurring during the same period in 1997 and 1999, when screenings were not required.

The analysis focused on sprain/strain accidents that occurred in the Transportation, Child Nutrition, and Custodial and Operations departments. Sprain/strains were reviewed instead of slips, falls, contusions and other types of injuries because screenings are designed to evaluate a person's ability to perform a job without experiencing overexertion, a leading cause of sprains and strains. During the 1998 test period, claims dropped 33 percent from the same period the previous year. Moreover, injury costs fell 57 percent.

Recommendation 63:

Establish post-offer, pre-employment screening as a means of reducing workers' compensation claims and costs.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Purchasing and Risk Management takes necessary steps to establish post-offer, pre-employment screening.	July 2001
2.	The director of Purchasing and Risk Management outlines a plan to require post-offer, pre-employment screening and consults with the district's legal counsel to ensure that the plan does not violate any applicable laws.	August 2001
3.	Based upon that plan, the director of Purchasing and Risk Management takes steps to contract with a provider to conduct screenings on behalf of the district.	September 2001
4.	The assistant superintendent of Human Resources implements post-offer, pre-employment screening.	November 2001

FISCAL IMPACT

Based on 1999-2000 claims, if the district saved 25 percent of average back injury costs after instituting post-offer pre-employment screenings (during the test period, costs for strains and sprains fell 57 percent in a similar size district), the total savings would be \$149,418 per year (\$597,671 x .25). This is a conservative estimate. One or two expensive claims screened out by the program could save the district tens of thousands of dollars.

These savings would be partially offset by the cost of the screenings, which were \$75 per person in a similar district. Last year FWISD hired 528 staff to fill positions as custodians, bus drivers, bus attendants, food service workers and food service substitutes. The cost of screening individuals in these positions would be \$39,600. The net fiscal impact per year would be \$109,818, with one half of that being realized in 2001-02.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Establish post-offer, pre-employment screening as a means of reducing workers' compensation claims and costs.	\$54,909	\$109,818	\$109,818	\$109,818	\$109,818

FINDING

FWISD does not have a districtwide safety manual. A safety manual is a compilation of rules, regulations and procedures to be followed in the workplace to ensure the safety of employees, contractors and others. Safety manuals ensure that all workers practice safety procedures and develop safety awareness. A safety conscious workforce results in safer working conditions, which translates into lower workers' compensation claims and costs.

The Texas Association of School Boards (TASB) publishes safety manuals for custodial, professional, transportation, food service and maintenance employees. These manuals contain general as well as job-specific safety information on general safety rules, lifting and handling techniques, electrical safety, ladder safety, slip/fall prevention, chemical safety and a variety of other safety topics. TASB provides these manuals free to school districts that participate in the Risk Management program at TASB and for a nominal charge, \$900 for the main manual, for self-funded districts that use TASB services as a third party administrator. The information in these manuals provides a solid foundation on which any entity can develop its own safety manual.

Recommendation 64:

Develop a districtwide safety manual and update annually.

A districtwide manual would provide the following benefits: streamline safety concepts districtwide; eliminate duplication of effort to devise a manual for each area; present a uniform safety philosophy; provide for continuity of certain safety procedures and send a message that safety is everyone's business. The district may want to consider the use of outside

consultants to develop the manual to ensure compliance with all applicable governmental requirements and to include current best practices from both public and private sectors.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Purchasing and Risk Management develops a work group of representatives from all areas of FWISD to advise outside consultants during the development of the safety manual.	October 2001
2.	The director of Purchasing and Risk Management develops specific requirements for the manual and prepares a request for proposals (RFP) to solicit bids.	December 2001
3.	Based upon the responses received, the consultant is selected and begins work under the direction of the work group.	January 2002
4.	The work group approves the safety manual and submits it for approval to director of Purchasing and Risk Management.	May 2002
5.	The director of Purchasing and Risk Management obtains senior management approvals and implements the manual.	August 2002

FISCAL IMPACT

The cost to develop the manual is \$1,000 with a similar cost to update annually.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Develop a districtwide safety manual and update annually.	(\$1,000)	(\$1,000)	(\$1,000)	(\$1,000)	(\$1,000)

Chapter 6

ASSET AND RISK MANAGEMENT

C. Fixed Assets

The director of Accounting has overall responsibility for fixed assets. A fixed asset accountant performs day-to-day fixed asset activities and spends approximately 70 percent of his time on fixed assets. Principals and department heads are directly responsible to all furniture and equipment located in their physical areas.

The Texas Education Agency (TEA) defines fixed assets as purchased or donated items that are tangible in nature, have a useful life longer than one year, have a unit value of \$5,000 or more and may be reasonably identified and controlled through a physical inventory system. The Texas Education Agency's *Financial Accountability System Resource Guide* requires assets costing \$5,000 or more to be recorded in the Fixed-Asset Group of Accounts. Items costing less than \$5,000 are recorded as an operating expense of the appropriate fund under TEA guidelines. These guidelines also allow school districts to establish lower thresholds for control and accountability purposes for equipment costing less than \$5,000. For example, computer and audiovisual equipment costing less than \$5,000 does not have to be accounted for in the fixed-asset group of accounts. However, some districts maintain lists of such assets for control and accountability purposes.

FWISD's fixed asset policy is more restrictive than TEA guidelines. It requires assets costing \$1,000 or more to be recorded in the Fixed-Asset Group of Accounts. An item valued at less than \$1,000 may be considered a fixed asset if it can be controlled and inventoried readily. Purchases of library books, microfiche, and microfilm are considered fixed assets if they are to be catalogued and controlled by the library. The district is planning to review this policy as it implements its plan to comply with Statement 34 by the Government Accounting Standards Board (GASB). GASB issues accounting and financial reporting rules for state and local governments throughout the United States. Statement 34 requires fixed assets to be reported in the financial statements net of depreciation and means that the district will have to maintain age and useful life information for its depreciable assets - those assets determined to be fixed assets by the district and reported in its fixed assets account group.

Exhibit 6-20 shows the balance of FWISD's fixed assets as of August 31, 2000.

**Exhibit 6-20
Fixed Assets As of
August 31, 2000**

Description	Balance August 31, 2000	Percent of Total Fixed Assets
Land	\$41,345,225	7.0%
Building & Improvements	385,456,985	70.0%
Furniture & Equipment	127,644,424	23.0%
Total	\$554,446,634	100%

Source: FWISD Comprehensive Annual Financial Report for the period ending August 31, 2000.

The district conducted its last inventory during the summer of 1998 through the spring of 1999. The director of Accounting estimated that the previous inventory had been conducted in 1994-95.

FINDING

The district's capitalization threshold for fixed assets is more restrictive than TEA requirements. The district's threshold is \$1,000. TEA recommends a \$5,000 threshold. Although a more restrictive threshold does not affect the district now, it may with the implementation of Statement 34. GASB Statement 34, issued June 1999, requires that capital assets be reported in the financial statements net of depreciation. Presently, state and local governments, which include school districts, are not required to depreciate their assets. Governments with total annual revenues of \$100 million or more must apply the statement for fiscal years beginning after June 15, 2001.

This means FWISD must begin complying with the provisions of the statement on September 1, 2001. To ensure compliance, FWISD must maintain age and useful life information for its depreciable assets. A lower capitalization threshold means that FWISD will be required to track depreciation for more assets. Maintenance of records not required by accounting standards or TEA requirements results in additional work for central administrators and school administrators.

Recommendation 65:

Raise the fixed assets capitalization threshold to \$5,000 for assets accounted for in the Fixed-Asset Group of Accounts.

For control and accountability purposes, some fixed assets costing less than \$5,000, such as computers and audio visual equipment, should continue to be inventoried; however, the items should not be accounted for in the Fixed-Asset Group of Accounts.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer instructs the director of Accounting to establish a capitalization threshold of \$5,000 for assets in the Fixed-Asset group of accounts.	July 2001
2.	The director of Accounting notifies the fixed asset accountant that, for purposes of classifying assets in the fixed asset group of accounts, the threshold is \$5,000.	July 2001
3.	The fixed asset accountant removes assets costing less than \$5,000 from the fixed asset group of accounts but maintains accountability for these assets in the fixed asset subsidiary records.	August 2001 and on-going

FISCAL IMPACT

This recommendation could be implemented with existing resources.

FINDING

The district's process to identify, track and manage fixed assets is manually intensive requiring multiple steps and manual processing of paper documents that could be entered directly on the system and does not provide timely information to the schools. The fixed asset accountant uses the following documents to update the fixed assets inventory: delivery tickets; salvage memos; equipment additions; transfers and deletions forms; and report of damage, fire or theft forms. The district's financial auditors have commented in their management letter that a significant, unreconciled difference between the general ledger fixed asset balance and the fixed asset detail records have existed for several years.

The present process requires the fixed asset accountant to physically collect delivery tickets from the warehouse, run a query of the accounting system to determine cost information and then adds the item to the fixed asset inventory. Although the system allows for distributed processing, as of October 2000, the warehouse did not enter receiving information directly in the district's accounting system, Comprehensive Information Management for Schools (CIMS III).

In addition, the accounts payable clerk enters receiving information at the time of payment. Items are not added to the inventory until a delivery ticket is received. The fixed asset accountant said that he depends on staff in the schools and departments to notify him to update an inventory item.

Regular reports are not issued to the schools or departments. The inventory additions are not reconciled to purchases in the accounting system until year-end closing.

FWISD has not been able to effectively implement the 1999 upgrade of the CIMS financial system fixed asset module. For example, items to be deleted from the 1998-99 inventory have only been marked as pending deletions rather than deleted due to problems in the implementation. Other implementation problems included incorrect depreciation calculations and inability to use certain internal reports after the upgrade.

Recommendation 66:

Modify the current inventory update process to more effectively use the automated system to update the fixed assets inventory.

The district should thoroughly review its current fixed asset process to more effectively use the CIMS module, reduce reliance on paper forms and create procedures that thoroughly document its fixed asset process. The inventory maintenance process should be modified to take advantage of the systems capabilities including allowing school and department staff to record the receipt of fixed assets using the system rather than completion of paper forms. The fixed asset detail subsystem should be reconciled to the general ledger on a monthly basis. A fixed asset physical inventory must be performed to establish a starting point for the monthly update process.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Accounting performs a comprehensive physical inventory of all assets that meet the requirements of GASB Statement 34 and any additional controls required by district policy.	June 2001
2.	The director of Accounting takes steps to modify the inventory update process.	July 2001
3.	The fixed asset accountant develops procedures for schools and departments to document the process.	August 2001
4.	School personnel and department administrative staff receive training.	September 2001

5. The director of Accounting implements the new process and procedures.	November 2001
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FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The district's periodic fixed asset inventory process does not provide timely or accurate information. There are no documented procedures and the turnover in the fixed asset accountant position that occurred in January 2000 has further reduced the district's institutional knowledge regarding the process.

Temporary employees, under the supervision of the Accounting manager, conducted the last inventory at each school during the summer months of 1998 without the participation of school administrators in most cases. The reconciliation process extended until the spring of 1999. Temporary employees performed a blind inventory of fixed assets in the schools and made a determination on each item found. Items identified with tag numbers were manually recorded and then added to a suspense file in the fixed asset system. A suspense file contains items that are held on a temporary basis until a final determination is made. Items included in the group furniture inventory were counted and added. Other items were listed but not tagged due to cost or other criteria.

At the conclusion of the inventory, a fixed asset exception report was generated by the system consisting of each item in the fixed asset system not identified during the review. Schools and departments were asked to review their report and indicate the disposition of each item. These dispositions were then recorded in the fixed asset system as pending deletions. Final action was not taken due to problems in the fixed asset module upgrade.

A review of the last inventory taken during the summer of 1998 identified a number of inefficiencies. The review team looked at the inventory folders of eight schools out of 120 in the district. Inventory forms were not routinely signed or dated. Two schools did not respond to the exception report. No indication was made in the file regarding any further action. The remaining six schools completed the exception report and indicated a disposition for each exception. Deletions were recorded in the system without further investigation regardless of cost or reason for deletion. Final inventory reports were not issued to the schools or departments. Attempts to trace items from the exception reports to the current fixed asset inventory were unsuccessful in four of the six items traced.

The director of Internal Audit stated that she had dropped fixed asset reviews from the individual school audits because auditors were unable to effectively trace the information.

The extended length of time spent on the inventory, the recording of deletion information without further investigation and the lack of final action severely limited the effectiveness of the inventory process.

Recommendation 67:

Modify the physical inventory process to increase accuracy and timeliness of information.

The district should thoroughly review its current fixed asset inventory process to develop a process that is timely and accurate. A comprehensive physical inventory should be taken based upon the requirements of GASB Statement 34 and any other controls required in district policy. This should be completed before the end of this fiscal year. Once a current inventory has been established for each school and department, monthly reports should be provided to each principal and department director so that accurate inventories can be maintained.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Accounting, working with the internal auditor, modifies the inventory process.	June 2001
2.	The fixed asset accountant develops procedures for schools and departments to document the process.	July 2001
3.	School personnel and department administrative staff receive training.	September 2001
4.	The director of Accounting implements new process and procedures.	November 2001

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 6

ASSET AND RISK MANAGEMENT

D. Bond Issuance and Indebtedness

The chief financial officer is responsible for the issuance of bonds, debt obligations and refinancing. The district contracts with a financial advisor for financial advice. On August 31, 2000, the district had \$327.96 million in general long term debt, including \$270,433,483 of general obligation bonds and \$291,367 of lease purchase obligations. Bond issues are refunded as appropriate.

In the last bond election in February 1999, voters approved \$398 million for the construction and renovation of school facilities. The district sold \$90 million of these bonds in April 1999 and \$132 million in January 2000, leaving \$176 million that will be sold in the future. **Exhibit 6-21** presents a summary of debt outstanding as of August 31, 2000 and **Exhibit 6-22** presents a summary of the 1999 bond proposal.

Exhibit 6-21
Outstanding Debt As of August 31, 2000

Description	Amount	Debt Service Requirements
General Obligation Bonds	\$270,433,483	\$466,396,488 (through 2020)
Notes and Leases Payable	\$291,367	\$306,223 (through 2001)
Total	\$270,724,850	\$466,702,711

Source: FWISD 2000 Comprehensive Annual Financial Report.

Exhibit 6-22
Summary of 1999 Bond Proposal

Proposal	Cost
High Schools	\$62,360,245
Middle Schools	41,802,321
Elementary Schools	86,450,628
12 New Elementary Schools	112,051,956

New Sixth Grade Centers	8,946,667
Special Campuses	1,865,003
Technology	21,980,000
ADA Compliance	21,980,000
A/C Gyms & Kitchens	10,990,000
Survey and Plats	1,000,000
Land Acquisition	4,000,000
FF & E	10,990,000
Asbestos abatement	12,089,000
Contingency	1,494,180
Total	\$398,000,000

Source: FWISD School and Community Relations Department.

FINDING

The district effectively presented its need to renovate schools and build new schools to taxpayers. FWISD is the ninth fastest-growing big city school district in the United States, adding 1,000 new students each year. Twenty percent of its students are educated in portable buildings and the district's schools are an average of 46 years old. The 1985 bond election funded nine new elementary schools, built additions at 49 others, and made numerous other improvements. Student enrollment has grown by 13,500 students since then.

To support its steady growth, the district must sell bonds and persuade taxpayers to finance them. The FWISD tax rate is one of the lowest tax rates in Tarrant County. In 1998-99 the district's tax rate of \$1.48 per \$100 valuation was lower than 14 of 16 school districts in the county. After an outside study of school needs, the district held a bond election in February 1999 to approve \$398 million in bonds. The bond referendum was approved by 88 percent of the voters.

The district planned a rigorous campaign to obtain community support for the bond election. Work began in 1997 with the hiring of an outside organization, the University of Texas at Arlington, to conduct a demographics study. In 1998 the district hired a project management firm to survey the schools and determine needs. The survey identified \$750 million in needs. The board conducted public hearings and pared the list

down to \$398 million that represented the most critical needs related to overcrowding, safety, and structural repairs.

In September 1998, the district sent postcards to registered voters and information to citizens over 65 regarding their right to freeze taxes and the board held work-study meetings. The district discussed the need for a bond election in its monthly advertisements in the *Fort Worth Star Telegram* and other targeted publications.

In November 1998, a citizens' action committee conducted a telephone survey to determine awareness and preferences. Fort Worth Chamber of Commerce strongly supported the district's bond referendum and chamber staff met with the top ten employers in the district to discuss the size of the expected tax increase. Packages were sent to principals providing information for teachers and other staff. The district distributed voter registration cards at schools and at PTA meetings.

In mid-December 1998 the board called for an election on February 9, 1999. The district began three-to-four day training sessions for parent and community volunteers who would be making presentations. Approximately 200 people were trained. 166 presentations were made, including 75 presentations by board members. The School and Community Relations Office mailed notices to community groups offering speakers and asking them to host presentations. The office also solicited parent volunteers to put materials together for the presentations. A hotline was created to answer questions. Parent volunteers returned calls. A video was prepared.

In January 1999, the superintendent and the board president met with employee groups, the NAACP, and Hispanic groups to discuss FWISD's needs. Targeted mailings were sent to parents, senior citizens, business leaders and interested citizens. These mailings were provided in English, Spanish and Vietnamese, as appropriate. Cards were prepared for each board member with a letter from that board member on the front and specific information on the back. The district encouraged early voting, issued numerous news releases and obtained the editorial endorsement of the *Fort Worth Star Telegram*. Voter educational materials were placed in employee pay statements and PTA newsletters. The annual district midwinter rally with business and community leaders was held right before the election. At the end of the bond campaign, the superintendent and executive staff took vacation time and/or spent evenings after work calling residents to remind them about the election.

The bond referendum passed by 88 percent.

COMMENDATION

FWISD combined thoughtful planning, a variety of strategies, and vigorous execution to obtain overwhelming support of its bond program.

Chapter 7

FINANCIAL MANAGEMENT

This chapter reviews the Fort Worth Independent School District's (FWISD) financial management functions and includes the following sections:

- A. Planning and Budgeting
- B. Accounting Operations
- C. Student Activity Funds
- D. Internal and External Audit

Financial management in school districts involves effective planning, budgeting and managing, and the district's ability to maximize resources. A district's ability to perform these tasks affects its relationships with its employees, vendors, funding agencies and the local community. Financial management is most effective when resources are spent based on the district's established priorities, when internal controls are in place and operate as intended, when financial information is provided in a timely way and in useful formats and when staff resources and technology are allocated efficiently to maximize results.

School districts must maintain and operate effective financial management systems in a highly regulated environment. They must meet financial management requirements established by federal and state laws, rules and regulations. The Texas Education Agency's (TEA) *Financial Accountability System Resource Guide* outlines accounting and reporting requirements for Texas school districts. Internally developed policies and procedures, Generally Accepted Accounting Principles and the Governmental Accounting Standards Board guidelines also affect school districts' financial management activities.

BACKGROUND

FWISD's total budgeted revenues for fiscal 2001 are nearly \$509 million and are generated from federal, state, local and other sources.

State revenues are generated through appropriations from the state's three tiers of funding. Tier I funding is designed so that school districts and the state share in the basic cost of education. Funding allotments under the Tier II formula are based on weighted students in average daily attendance (WADA). WADA is a measure of the special needs and costs of students in such programs as special education, compensatory education, bilingual education, and gifted and talented programs. This formula recognizes that certain types of students require additional resources to meet their educational needs. Tier I formulas also provide partial funding for school transportation. Tier I allotments are adjusted for the individual district's property tax base. Therefore, a district's property wealth factors significantly into the state funding formula.

Tier II funding rewards the local tax efforts made by a district by guaranteeing that tax effort in the current year beyond the required local share in Tier I.

Texas Senate Bill 4 of 1999 added a new component to the education funding formula. Tier III funds, as the component is known, provides for local school districts to receive partial state funding for debt service requirements on previously issued bonds.

Local revenues are primarily generated through the local property tax system. The Texas Constitution authorizes local governments, including school districts, to levy property taxes. School property taxes represent almost 60 percent of total property taxes levied in the state. Property taxes levied by school districts are important because they can significantly impact the amount of funding provided to individual districts by the state. There are two categories of property levies made by school districts. The maintenance and operations (M&O) portion is used to cover routine operating costs of education, while the interest and sinking (I&S) portion is used for debt service for financing building programs.

FWISD's Board of Trustees sets the district's tax rate. The board sets the tax rate after the adoption of the district budget in accordance with state law. The local appraisal district is responsible for setting property values and certifying tax rolls. In May of each year, the appraisal district provides an initial revenue estimate, but certified tax rolls are not available until July.

Local property taxes provide a significant source of revenue for FWISD. The 1998-1999 tax levy of \$182.4 million was 41 percent of the total district revenues for that year.

In September 2000, the FWISD Board of Trustees increased its adopted tax rate by 8.3 percent, from \$1.515 to \$1.6411 per \$100 of assessed value for school year 2000-2001. The increase was necessary to offset an anticipated reduction in state funding due to increased property values and to help fund payments for the district's general obligation bonds. In the previous two fiscal years, the district increased the tax rate by approximately 2 percent. The FWISD board did not increase the tax rate between fiscal 1996 and fiscal 1998. **Exhibit 7-1** depicts FWISD's adopted tax rates from 1995-96 through 2000-01.

Exhibit 7-1
FWISD's Historical Tax Rates Per \$100 of Assessed Value
1995-96 Through 2000-01

Year	M&O Tax Rate	Debt Fund Rate	Total Tax Rate	Percent Increase/(Decrease) from Prior Year
1995-96	\$1.3150	\$0.1400	\$1.4550	-0.7%
1996-97	\$1.3150	\$0.1400	\$1.4550	0.0%
1997-98	\$1.3110	\$0.1440	\$1.4550	0.0%
1998-99	\$1.3520	\$0.1330	\$1.4850	2.1%
1999-2000	\$1.3955	\$0.1195	\$1.5150	2.0%
2000-01	\$1.4555	\$0.1856	\$1.6411	8.3%

Source: Tarrant County Appraisal District.

The projected revenue for fiscal 2001 shows an increase of 17.4 percent from fiscal 1999. **Exhibit 7-2** presents FWISD's projected tax revenue from 1998 through 2001.

Exhibit 7-2
FWISD's Property Tax Revenue Projections
1998-99 Through 2000-01

	1998-99	1999-2000	Percent Change 1998-99 to 1999- 2000	2000-01	Percent Change 1999-2000 to 2000- 2001
M&O Tax Rate	\$1.3520	\$1.3955	3.2%	\$1.4555	4.3%
Debt Fund Rate	\$0.1330	\$0.1195	-10.2%	\$0.1856	55.3%
Total Tax Rate	\$1.4850	\$1.5150	2.0%	\$1.6411	8.3%
Net Taxable Value	\$12,716,080,432	\$13,387,492,149	5.3%	\$14,508,397,762	8.4%
Projected Revenue*	\$188,833,794	\$202,820,506	7.4%	\$238,097,316	17.4%

Source: Tarrant County Appraisal District.

* Projected Revenue does not include the revenue loss due to frozen taxes on "over-65" accounts. In 1998-99, there were losses totaling \$6.4 million. The losses for 1999-2000 and 2000-2001 are not known at this time.

Exhibit 7-3 shows assessed values of personal and real property in the district since 1995. Personal property includes moveable items such as equipment, and real property includes land and buildings and the fixtures permanently attached to them. As the figures show, assessed values have increased approximately 5 to 6 percent in 1999 and 2000. As taxable values of personal and real property increase in a district, state allocated revenues decrease. After experiencing declines during the 1980's and early 1990's, the district's property values have recovered. Starting in the mid-1990s, assessed values have been steadily increasing. In fiscal 2000 taxable property values increased by almost 6 percent from the previous fiscal year due to a robust economy and several major corporations moving their headquarters to Fort Worth.

Exhibit 7-3
FWISD

**Total Assessed Property Values
1994-95 Through 1999-2000**

Year	Real Property	Personal Property	Total Assessed Value	Percent Increase/Decrease
1995	\$8,635,157,925	\$2,410,564,496	\$11,045,722,421	-8.5%
1996	\$9,173,495,934	\$2,669,883,623	\$11,843,379,557	7.2%
1997	\$9,447,482,265	\$2,721,262,741	\$12,168,745,006	2.7%
1998	\$9,079,448,614	\$2,927,613,279	\$12,007,061,893	-1.3%
1999	\$9,703,848,650	\$3,012,231,782	\$12,716,080,432	5.9%
2000	\$10,224,106,799	\$3,163,385,350	\$13,387,492,149	5.3%

Source: FWISD Comprehensive Annual Financial Report for the fiscal year ending August 31, 2000.

Exhibit 7-4 shows a comparison of FWISD's tax rates to those of its peers and to the state average. As this exhibit shows, FWISD's total tax rate ranks the highest among the peer districts and is higher than the state average of \$1.4741 per \$100 of assessed value.

**Exhibit 7-4
Tax Rate Per \$100 of Assessed Value
FWISD and Peer Districts
1999-2000**

District	M&O Tax Rate	Debt Fund Rate	Total Tax Rate
Fort Worth	\$1.4555	\$0.1856	\$1.6411
El Paso	\$1.4505	\$0.1011	\$1.5516
Austin	\$1.4104	\$0.1382	\$1.5486
Dallas	\$1.4780	\$0.0695	\$1.5475
Houston	\$1.4030	\$0.1160	\$1.5190
State Average	\$1.3839	\$0.0902	\$1.4741

Source: Comptroller of Public Accounts, Property Tax Division, 1999-2000.

FWISD's total budgeted revenues for all funds for fiscal 2001 are \$508,973,389. As shown in **Exhibit 7-5**, budgeted revenues for the general fund are \$443,398,537 from all sources, while revenues from the special revenue and debt service funds are \$31,673,686 and \$33,901,166, respectively. The general fund relates to the general operations of the district and is used to account for all revenues and expenditures not accounted for in other funds. The special revenue fund is used to account for the proceeds of specific programs that are legally restricted as to their expenditures. The payment of principal and interest on the

district's general obligation bonds is accounted for in the debt service fund. The district also has a capital projects fund with a budget totaling \$233,873,655 for fiscal 2001. The fund is used to account for the acquisition of capital facilities by proceeds from long term financing and other authorized sources. (A detail of the capital projects budget is shown in **Exhibit 7-9**). In addition to these four funds, the district also maintains a food services fund and two internal service funds - the insurance fund and the print shop/mailroom fund. The district uses an agency fund to account for the receipts and disbursements of funds from student activities. The food services fund accounts for the district's cafeterias, and the two internal service funds account for the internal operations of employee medical claims and insurance policies and the district's internal printing and mailing functions.

Exhibit 7-5
FWISD's Revenue Sources for General Fund,
Special Revenue Fund and Debt Service Fund
2000-01

Source of Revenue	General Fund	Percent of Total	Special Revenue Fund	Percent of Total	Debt Service Fund	Percent of Total	Total All Funds	Percent of Total
Local revenue	\$210,965,469	47.6%	\$2,855,955	9.0%	\$26,068,927	76.9%	\$239,890,351	47.1%
State revenue	221,064,684	49.9%	5,620,299	17.7%	7,832,239	23.1%	\$234,517,222	46.1%
Federal revenue	2,064,000	0.5%	23,197,432	73.2%	0	0.0%	\$25,261,432	5.0%
Other sources	9,304,384	2.1%	0	0.0%	0	0.0%	\$9,304,384	1.8%
Total revenues	\$443,398,537	100.0%	\$31,673,686	100.0%	\$33,901,166	100.0%	\$508,973,389	100.0%

Source: FWISD Budget document for fiscal year 2001. Note: Totals may not add due to rounding.

Exhibit 7-6 shows the detailed make up of general fund sources since 1996-97. As the exhibit shows, the percent of local revenue sources for the operating budget increased from 44.8 percent in fiscal 2000 to 47.6 percent of budgeted revenues for the current year, representing an increase of 12.5 percent. In spite of additional state funding to pay for teacher salary increases, state funding dropped almost 4 percent, from \$229,402,552 in fiscal 2000 to \$221,064,684 in fiscal 2001. This decrease is due in part to the Tier I funding formula that adjusts the amount of state revenue available to a district based on the assessed value of property in the district.

Exhibit 7-6
FWISD
Sources of Revenue for the General Fund
1996-97 Through 2000-01

Source of Revenue	2000-01	Percent of Total	1999-2000	Percent of Total	1998-99	Percent of Total	1997-98	Percent of Total	1996-97	Percent of Total
Local revenue	\$210,965,469	47.6%	\$187,562,555	44.8%	\$172,619,468	45.7%	\$155,018,000	42.8%	\$160,997,000	48.9%

State revenue	221,064,684	49.8%	229,402,552	54.7%	202,936,801	53.8%	205,600,000	56.7%	165,957,712	50.5%
Federal revenue	2,064,000	0.5%	2,064,000	0.5%	1,750,000	0.5%	1,850,000	0.5%	1,973,000	0.6%
Other sources	9,304,384	2.1%	50,000	0.0%	50,000	0%	50,000	0.0%	50,000	0%
Total revenue	\$443,398,537	100.00%	\$419,079,107	100.00%	\$377,356,269	100.00%	\$362,518,000	100.00%	\$328,977,712	100.00%

Source: FWISD Budget documents for the fiscal years noted.

Note: The increase in "other sources" for fiscal 2001 is due to a transfer from fund reserves and a carryover surplus from the prior year's operating budget.

Exhibit 7-7 shows a breakdown of FWISD's expenditures by function in fiscal 1996 through 2000. The instruction category includes teacher salaries and all activities dealing directly with the interaction between teachers and students, including instruction aided with computers. **Exhibit 7-8** shows that FWISD is ranked third as compared to its peer districts and is below the state average in instructional spending percentages.

Exhibit 7-7
FWISD Budgeted Total Expenditures by Function
1996-97 Through 1999-2000

Function	1996-97	1996-1997 Percent of Total	1997-98	1997-1998 Percent of Total	1998-99	1998-1999 Percent of Total	1999-2000	1999-00 Percent of Total
Instruction	\$193,247,926	50.4%	\$205,743,645	49.4%	\$216,285,328	50.3%	\$241,229,572	50.9%
Instructional Related Services	14,264,935	3.7%	14,742,600	3.5%	16,827,612	3.9%	16,986,292	3.6%
Instructional Leadership	7,961,329	2.1%	8,575,027	2.1%	8,395,165	2.0%	8,859,972	1.9%
School Leadership	24,618,340	6.4%	23,919,350	5.7%	25,806,954	6.0%	27,230,757	5.7%
Support Services Students	18,462,787	4.8%	20,490,767	4.9%	22,843,590	5.3%	24,435,849	5.2%
Student	10,560,567	2.8%	10,479,690	2.5%	11,061,406	2.6%	11,969,086	2.5%

Transportation								
Food Services	19,554,860	5.1%	20,969,864	5.0%	20,938,515	4.9%	21,585,146	4.6%
Cocurricular/ Extracurricular Activities	5,555,997	1.5%	5,889,218	1.4%	6,193,272	1.4%	6,506,197	1.4%
Central Administration	9,583,761	2.5%	11,112,084	2.7%	10,315,437	2.4%	10,688,593	2.3%
Plant Maintenance and Operations	47,940,498	12.5%	49,347,706	11.8%	49,999,252	11.6%	51,738,655	10.9%
Security and Monitoring Services	4,899,474	1.3%	6,303,720	1.5%	7,040,668	1.6%	7,705,904	1.6%
Data Processing Services	2,463,386	0.6%	2,853,500	0.7%	3,348,191	0.8%	3,678,728	0.8%
Other*	23,998,599	6.3%	36,349,032	8.7%	31,204,206	7.3%	41,425,054	8.7%
Total Budgeted Expenditures	\$383,112,459	100.0%	\$416,786,203	100.0%	\$430,259,596	100.0%	\$474,039,805	100.0%

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

Exhibit 7-8
FWISD and Peer Districts
Total Budgeted Expenditures by Function
1999-2000

Function	Dallas ISD	Houston ISD	Fort Worth ISD	Austin ISD	El Paso ISD	State Average
Instruction	53.8%	51.8%	50.9%	44.9%	50.4%	51.7%
Instructional Related Services	2.9%	3.3%	3.6%	1.8%	3.0%	2.6%
Instructional Leadership	1.6%	1.1%	1.9%	1.2%	2.1%	1.2%
School Leadership	5.6%	6.6%	5.7%	5.4%	5.6%	5.2%
Support Services - Students	4.6%	4.3%	5.2%	2.7%	4.3%	4.0%
Student Transportation	0.4%	2.5%	2.5%	3.1%	2.2%	2.4%

Food Services	5.3%	4.9%	4.6%	5.0%	4.8%	4.8%
Cocurricular/ Extracurricular Activities	0.9%	0.7%	1.4%	0.7%	1.8%	2.3%
Central Administration	2.7%	3.0%	2.3%	2.6%	3.4%	3.5%
Plant Maintenance and Operations	10.9%	10.3%	10.9%	7.4%	8.6%	9.6%
Security and Monitoring Services	0.8%	0.9%	1.6%	0.6%	0.5%	0.5%
Data Processing Services	1.9%	1.5%	0.8%	1.0%	0.9%	1.0%
Other*	8.3%	9.1%	8.7%	23.5%	12.5%	11.2%

Source: Texas Education Agency, AEIS 1999-2000.

*Includes any operating expenditures not listed above and all non-operating expenditures such as debt service, capital outlay and community and parental involvement services.

In February 1999, voters approved a \$398 million capital improvement program. The program is funding 16 new schools, classroom additions, technology and other improvements. Implementation of the bond program will be phased in over a five-year period. In the spring of 1999, an initial sale of \$90 million in bonds was completed, and in January 2000 another \$132 million were sold. The remaining \$176 million in bonds will be sold during 2001 to 2003. **Exhibit 7-9** shows a detail of the bond program's capital budget for fiscal 2001.

Exhibit 7-9
FWISD's Capital Projects Budget
2000-2001

Source of Funds	Amount
Bond Proceeds - Phase I (Spring 1999)	\$90,000,000
Bond Proceeds - Phase IA (Winter 2000)	132,000,000
Transfer In From Food Service Fund	3,300,000
Investment Earnings to Date	8,573,655
Total Sources of Funds	\$233,873,655
Budgeted Use of Funds	(\$228,847,155)
Estimated Contingency	\$5,026,500

Source: FWISD Bond Program Status as of August 31, 2000.

The district uses a financial management system called the Comprehensive Information Management for Schools (CIMS III), operated on an AS 400 computer. Computerized applications include budgeting, general ledger, purchasing, accounts payable, cash receipts, warehouse and fixed asset inventory, and payroll. In September 1999, the district upgraded the software to solve potential operating problems associated with year 2000 issues. Prior to the 1999 upgrade, the older version of CIMS III had several customized programs including reporting features. With the implementation of the newer version, many of the custom reporting capabilities were overwritten. The district is now working to recover these.

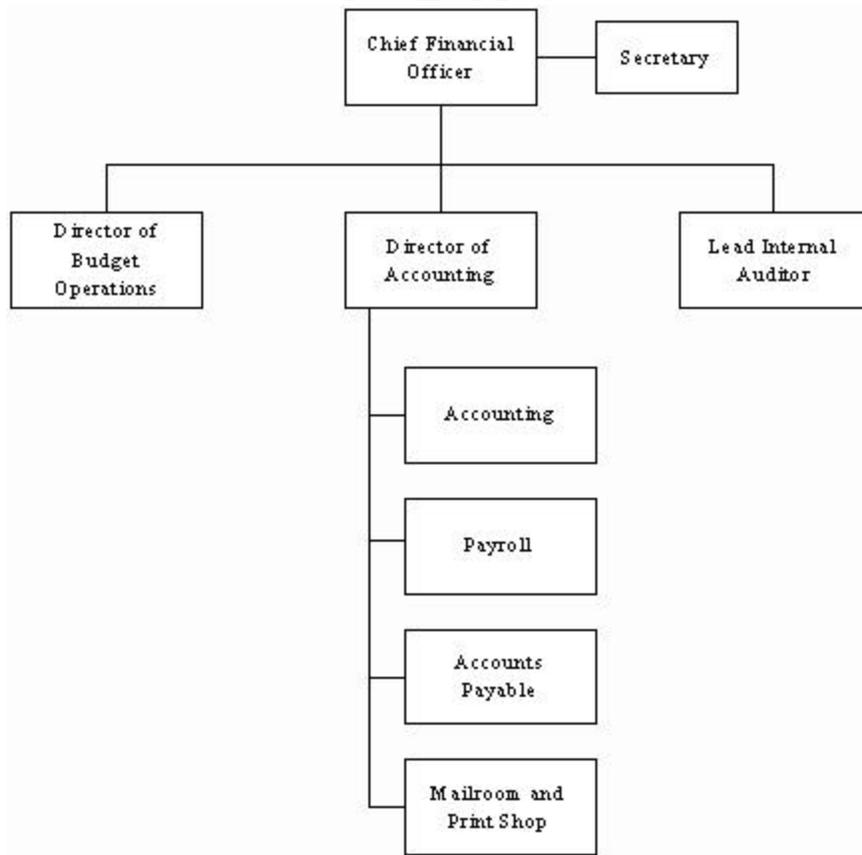
Also upon conversion to the new system, report-generating capabilities were decentralized. Departments can now look-up and print reports rather than having to wait for paper reports from the Budget department.

The organizational chart shown in **Exhibit 7-10** shows the structure of finance and budget in the district. The chief financial officer, who reports directly to the superintendent, manages all the financial and budgeting operations, internal audits, purchasing and risk management of the district. Risk management and purchasing are addressed in other chapters of this report.

The director of Budget Operations is charged with budget preparation and monitoring, as well as the cash management of the district. The Payroll and Accounts Payable departments both report to the director of Accounting, as does the general accounting operations of the department. The district's mailroom and print shop operations also fall under the director of Accounting. The lead internal auditor who reports to the chief financial officer manages internal audits in the district.

Exhibit 7-10
Organizational Structure of FWISD's
Accounting and Budget Functions

November 2000



Source: FWISD's Accounting department.

Chapter 7

FINANCIAL MANAGEMENT

A. Planning and Budgeting

FWISD's Budget department manages the district's budget preparation and monitoring. **Exhibit 7-11** shows the organizational structure of the department. Supervised by the director of Budget Operations, the department maintains a budget coordinator and a budget clerk who handle the daily budget. In addition, the chief financial officer has significant involvement in the budgeting process.

The cash/budget manager and cashier positions are primarily responsible for the receipt of funds in the district, cash flow analysis, and investments. These functions will be addressed in other chapters of this report.

All schools and departments are required to monitor their budgets and to transfer funds between accounts within their school or departmental budgets when necessary to cover expenditure items. When budget transfers are necessary, each department or school is responsible for submitting a budget transfer request on-line through the CIMS III system. All transfer requests are routed electronically to the Budget department where they are reviewed by either the director of Budget Operations or the budget coordinator, and are either approved, denied, or returned for more detailed information.

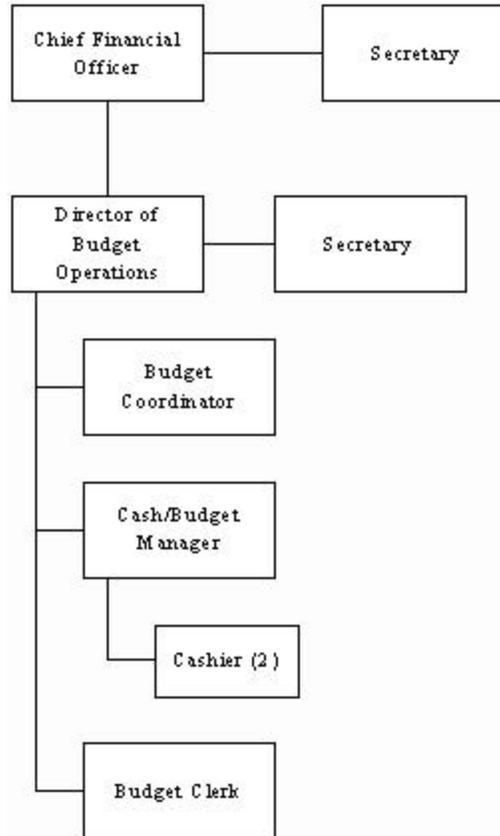
The CIMS III budget and accounting system uses an encumbrance feature for budgetary control. The encumbrance feature prohibits any expenditure transaction from being accepted unless adequate funds remain in the account, with the exception of payroll expenditures. The system allows all payroll transactions to be entered to the system regardless of whether or not adequate funds exist.

In accordance with Texas Education Code section 44.006, the school board has the authority to amend the approved budget or to adopt a supplementary emergency budget to cover necessary unforeseen expenses.

FWISD maintains community input in its budget process in two ways. First, through its Site-Based Decision-Making (SBDM) teams that includes community members. In addition, parents, teachers and other interested community stakeholders are invited to SBDM meetings to discuss and help prepare a school's budget. Secondly, community input is made available through open board meetings where annual budget hearings are held to discuss the adoption of the budget and tax rate for the upcoming year. Community members are allowed to address the school

board at this time and during any regularly scheduled meeting on this or any other education related issue.

Exhibit 7-11
Organizational Structure of
FWISD's Budget Department
October 2000



Source: FWISD Budget department.

To direct the budget process, the district maintains an executive council made up of the following members:

- Associate Superintendent of Instructional Support and Auxiliary Services;
- Associate Superintendent of Instructional Area I;
- Associate Superintendent of Instructional Area II;
- Associate Superintendent of School Operations;
- Associate Superintendent of Non-Instructional Services;
- Associate Superintendent of Curriculum; and
- Chief Financial Officer.

The executive council meets approximately three to four times during the budget process to review prepared departmental budgets and to prioritize needs for funding. After setting spending priorities, the budget is then submitted to the superintendent for review and final approval before being presented to the board's Budget/Audit Committee. The Budget/Audit Committee is composed of the board president, three board members and the superintendent. They review the budget prior to its consideration by the full board. As shown in **Exhibit 7-12**, the board receives regular status reports on the budget throughout the process beginning in June.

The board's Budget/Audit Committee's purpose is twofold: first to review information and provide input throughout the budget preparation process, and secondly to review the annual financial statements and the report of the external auditor.

As shown in **Exhibit 7-12**, the district's budget process begins in February of each year when budget materials are distributed to schools and departments. In April of each year, all departments and schools are requested to submit their budget requests for the upcoming year. All department heads and principals are responsible for preparing and submitting a base budget referred to as a level I budget. The level I budget represents funding requests for items needed in the upcoming year to maintain the current level of operations. In addition to the level I budget requests, associate or assistant superintendents are allowed to submit level II requests. Level II requests include requested funding for expanded services or programs, and include capital expenditure and new position requests.

Exhibit 7-12
FWISD's Budget Calendar for
Fiscal 2001 Budget Preparation

Date	Description
February	Budget department distributes budget materials to schools and departments.
February	Budget department conducts budgetary training for budget managers upon request.
April 5	Schools and departments return budget documents to the Budget department.
April 5 - 28	Budget department staff inputs budget information into the budget development module of CIMS III; Budget department staff verify all input.
May	Executive Council reviews expenditure budget

	information and reduces requests where appropriate based on historical expenditure trends; level II, staffing and capital outlay requests are also reviewed and prioritized.
May 15	Budget department receives preliminary tax values from the appraisal district.
May 15	Director of Budget Operations and chief financial officer prepare preliminary revenue projections.
May 15 - 26	Executive council continues prioritization of level II, staffing and capital outlay requests.
June 6-14	Executive Council consults with various employee organizations.
June 12	Board Budget/Audit Committee meets to discuss budget status.
June 13	Director of Budget Operations and chief financial officer present status report on budget to entire school board.
June 26	Board Budget/Audit Committee meets to discuss budget status.
June 27	Director of Budget Operations and chief financial officer present status report on budget to entire school board.
June 28 - July 11	Director of Budget Operations, chief financial officer and executive council further refine budget and presentation of proposed budget document.
July 11	Director of Budget Operations and chief financial officer present status report on budget to entire school board.
July 25	Chief appraiser certifies rolls to taxing units.
July 25	Director of Budget Operations calculates rollback tax rate and finalizes revenue projections; based on finalized revenue projections budget is further revised if necessary.
July 25	Director of Budget Operations and chief financial officer present status report on budget to entire school board.
July 31	Board Budget/Audit Committee meets to discuss budget status.

August 8	Director of Budget Operations and chief financial officer present proposed budget and tax rate to school board.
August 11	District staff publishes "Notice of Public Meeting to Discuss Budget and Proposed Tax Rate" within required time parameters.
August 22 (Regular 4 th Tuesday Meeting)	School board holds public hearing on fiscal 2001 budget and tax rate; final amendment of 1999-2000 budget is made.
August 29 (Specially Called Meeting Tuesday)	School board adopts fiscal 2001 budget.
September 12 (Specially Called Meeting Tuesday)	School board adopts tax rate.

Source: FWISD Budget department, October 2000.

The director of Budget Operations provides each school with a projected budget allocation based on projected enrollment figures. Using these initial allocations, principals, staff, and site-based management teams prepare the school budget. Departments are provided with their base budget from the prior year. By May of each year the executive council makes initial budget cuts based on historical expenditure trends.

In mid-May, the district receives preliminary tax values from the appraisal district, and the director of Budget Operations then makes initial revenue projections. After initial budget projections have been determined, the executive council continues to refine the detailed departmental Level I and Level II budget requests. At this time, the council begins to rank level II budget requests by priority.

FINDING

FWISD overspent its budget at the functional level since fiscal 1997 due to payroll expenses that occur late in the fiscal year after a final budget amendment has been approved by the board and entered into the automated budget system. Following this final amendment, however, payroll expenses are incurred for the remainder of the fiscal year. The CIMS system allows payroll to be posted because employees must be paid timely.

For two out of the last four fiscal years, actual expenditures have exceeded budgeted expenditures by more than \$1 million without school board

approval. **Exhibit 7-13** shows the individual functions that exceeded their budget allocations in fiscal years 1997 through 2000. In 1999, for example, instruction was overspent by \$957,430, and spending in the community services was \$159,812 more than budgeted. During fiscal 2000, total overspending was \$176,881.

Exhibit 7-13
FWISD Actual Expenditures in Excess of Budget
1996-97 Through 1999-2000

Function	Budgeted Expenditures	Actual Expenditures	Over Expended Amount
Fiscal Year Ending August 31, 2000			
Social Work Services	\$1,897,625	\$1,979,798	\$82,173
Security and Monitoring Services	7,934,721	8,029,429	94,708
Total	\$9,832,346	\$10,009,227	\$176,881
Fiscal Year Ending August 31, 1999			
Instruction	\$221,439,075	\$222,396,505	\$957,430
Social Work Services	1,725,814	1,727,806	1,992
Health Services	4,181,776	4,204,611	22,835
Community Services	2,225,670	2,385,482	159,812
Payments to Juvenile Justice Alternative Education Fund	130,000	130,924	924
Total	\$229,702,335	\$230,845,328	\$1,142,993
Fiscal Year Ending August 31, 1998			
Instructional Leadership	\$7,911,366	\$8,048,776	\$137,410
Health Services	3,837,185	3,997,049	159,864
Cocurricular/Extra Curricular Activities	5,990,691	6,080,445	89,754
Community Services	1,256,114	1,326,028	69,914
Total	\$18,995,356	\$19,452,298	\$456,942
Fiscal Year Ending August 31, 1997			
Pavroll (Nutrition Services	\$9,998,400	\$10,494,786	\$496,386

Fund)			
Supplies (Nutrition Services Fund)	8,095,000	8,773,317	678,317
Instructional Leadership	7,839,693	7,924,906	85,213
Co-curricular/ Extracurricular Activities	5,370,416	5,534,279	163,863
Debt Service	1,531,812	1,538,918	7,106
Total	\$32,835,321	\$34,266,206	\$1,430,885

Note: All functions are in General Fund except where noted. Source: FWISD Comprehensive Annual Financial Reports for the fiscal years noted.

Texas Education Code 44.006 and the TEA's *Financial Accountability System Resource Guide* require school boards to amend the annual budget, if necessary, prior to August 31 by official board action. The FWISD superintendent prepares and presents budget amendments for the board's consideration and approval as necessary. **Exhibit 7-14** shows a detail of the final budget amendment presented to the board at the August 22, 2000 meeting.

Exhibit 7-14
FWISD's Final Budget Amendment
August 22, 2000

Description	Current Budget	Change	Amended Budget
REVENUE SOURCES:			
Local Revenue	\$188,562,555	0	\$188,562,555
State Revenue	230,081,493	(1,525,000)	228,556,493
Federal Revenue	2,064,000	0	2,064,000
Other Revenue	50,000	0	50,000
Reimbursements from Bond Proceeds	5,260,100	(3,352,304)	1,907,796
Fund Balance	6,514,111	1,037,857	7,551,968
Fund Balance - Prior Period	0	16,000,000	16,000,000

Adjustments			
TOTAL REVENUE SOURCES	\$432,532,259	\$12,160,553	\$444,692,812
EXPENDITURES:			
Instruction	\$246,722,541	\$691,817	\$247,414,358
Instruction Resources and Media Services	11,873,803	(2,532,449)	9,341,354
Curriculum and Instructional Staff Development	10,382,977	(219,416)	10,163,561
Instructional Administration	9,092,826	179,589	9,272,415
School Administration	28,102,720	(183,268)	27,919,452
Guidance and Counseling Services	18,226,438	732,563	18,959,001
Social Work Services	1,804,890	92,735	1,897,625
Health Services	4,511,331	59,698	4,571,029
Pupil Transportation	12,287,671	10,132,965	22,420,636
Food Services	257,985	16,166	274,151
Co-curricular/Extracurricular Activities	6,607,688	265,872	6,873,560
General Administration	10,837,980	84,514	10,922,494
Plant Maintenance and Operations	52,296,203	2,495,280	54,791,483
Security and Monitoring Services	7,822,382	112,339	7,934,721
Data Processing Services	4,201,976	108,798	4,310,774
Community Services	2,765,304	93,350	2,858,654
Debt Service	1,117,000	30,000	1,147,000
Facility Acquisition and Construction	2,308,662	0	2,308,662
Juvenile Justice Alternative Education	150,000	0	150,000
Tax Increment Fund	461,882	0	461,882
Operating Transfer to E-Rate	700,000	0	700,000
TOTAL EXPENDITURES	\$432,532,259	\$12,160,553	\$444,692,812

Source: FWISD Consent Agenda, August 22, 2000.

As shown in **Exhibit 7-14**, the board amends the budget in mid to late August annually, but then the payroll expenditures are incurred which creates the over expenditure after the final amendment has been made.

The Texas Education Agency's *Financial Accountability System Resource Guide*, Section 1.1.1 (GAAP and Legal Compliance) states the following:

The annual operating budget is one of the most important of all legal documents governing financial transactions. Upon board of trustee approval, the expenditure requests in the budget become binding appropriations that may not legally be exceeded by the school district without an amendment.

Furthermore, Section 1.1.2 (Legal Requirements) states:

The school district's board minutes should be used to record the adoption of the budget and any amendments to the budget. Budget amendments are to be made prior to exceeding a detailed functional expenditure category, and these amendments are to be recorded in the board minutes. Filing of the final amended budget with TEA is satisfied whenever the annual audit report, showing a comparison of budget amounts with actual amounts, is filed.

Recommendation 68:

Require all accrued expenditures be included in the final budget amendment presented to the board.

FWISD should ensure that all expenditures, including payroll, are made in accordance with the rules and standards prescribed by the TEA. Spending activity occurring near the end of the fiscal year should be carefully monitored and reviewed, and when needed, budget amendments including all accruals, be prepared and approved in a timely manner by the school board.

Payroll expenses are fairly routine and predictable. District staff should ensure that final payroll accruals are accounted for in the final budget amendment presented to the board.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer identifies all final payroll and other accruals.	June 2001
2.	The director of Budget Operations prepares budget amendments as necessary for presentation to the school board.	Ongoing

3.	The director of Budget Operations submits the budget amendments to the superintendent for review and approval prior to submission to the school board.	Ongoing
4.	The superintendent ensures that all budget amendments are presented to the school board prior to funds being expended.	Ongoing

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

District department heads, principals and budget clerks/secretaries have not been adequately trained in accessing and monitoring their on-line budget because they have difficulty running budget reports. Prior to September 1999 when the district upgraded its computer system, all department heads and principals received monthly paper budget reports from the Budget department. With the conversion to the new system, however, departmental staff obtained the ability to query financial information and print their own reports. This new change has received mixed results in the district. Some departments and schools are capable of running the reports they need. Other departments, however, have difficulty doing this. Four managers in various district departments said that they did not know how to access and run their budget reports and that they didn't know their total budgets.

Prior to conversion to the upgraded version of CIMS III in September 1999, all principals, financial secretaries and budget managers were trained on use of the new system. However, this was the only training provided to district staff. In addition, the Budget department has distributed a one-page instruction sheet on how to access on-line financial data.

Budget department staff state that the problem is not only a matter of training but that some printer setups had not been established for some departments, a problem that has since been corrected. However, interviews with the staff members having difficulty with the on-line budget access function reveal that the problem is attributed to a general lack of understanding of the system.

Recommendation 69:

Provide mandatory training for all personnel responsible for monitoring a budget.

The Budget department should ensure that all budget managers and other personnel responsible for monitoring budgets and making expenditure decisions receive immediate and ongoing training on the budget reporting system.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Budget Operations and the chief financial officer coordinates with the Information Services department staff to conduct CIMS III training classes.	June 2001
2.	The director of Budget Operations develops and distributes a training schedule for all departments.	July 2001
3.	All department budget managers, principals, and financial secretaries attend training.	October 2001
4.	The director of Budget Operations maintains a continuous schedule of training classes on a periodic basis.	Ongoing

FISCAL IMPACT

This recommendation can be implemented using existing staff resources in the Budget and Information Services departments.

FINDING

FWISD does not base budget allocations on performance measures. Performance measurements are indicators that establish empirically-based measures of organizational performance in key mission areas and give managers a method of comparing performance over time. An example of a performance measure for a purchasing function would be the cost of issuing a purchase order. Without a system of performance measures, it is difficult to evaluate the effectiveness of funding for various programs and making informative decisions regarding the allocation of funding.

The director of Budget Operations sends a budget packet to each principal and department head asking them to complete a budget request form. The forms show prior year budget amounts, with space for inserting current-year budget requests with no justification required for budgeted requests. Capital outlay or level II budget requests do require a justification, but departments are never evaluated as to whether goals were achieved.

Recommendation 70:

Implement a system of performance-based budgeting and invest in performance-based budget training for school district staff.

The Governmental Accounting Standards Board (GASB), which sets the financial reporting rules for state and local governments, and the Government Finance Officers Association (GFOA) highly encourage the use of performance measures in local government budgets. In fact, the GASB is contemplating mandating the use of performance measures for local governments. In April 2000, GASB released 12 case studies that use performance-based measurement at its annual conference in Austin, Texas.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The FWISD board directs the superintendent to begin implementing a system of performance-based budgeting for the fiscal 2003 budget cycle.	July 2001
2.	The chief financial officer and the director of Budget Operations contact sources such as the GASB, GFOA and the Texas Association of School Boards to obtain the most current information on performance-based budgeting training.	July 2001
3.	The director of Budget Operations submits a funding request for performance-based budgeting training.	July 2001
4.	The chief financial officer, director of Budget Operations and the budget coordinator attend training.	By November 2001
5.	The chief financial officer and director of Budget Operations work to provide training for all department heads and other employees with budgeting responsibilities.	January 2002
6.	The chief financial officer and director of Budget Operations work closely with all departments to develop performance-based budgets.	Ongoing
7.	All departments submit performance-based budgets.	February 2002

FISCAL IMPACT

The cost of implementing this recommendation will include the cost of staff training in performance-based budgeting. The GASB and similar organizations can provide training for approximately \$475 per person. Most likely, training would be available in the Fort Worth area, so travel expenses would not be necessary. The total cost for training would be \$1,425 (\$475 x 3 people) for the chief financial officer, director of Budget Operations and budget coordinator. Those staff would then train others as needed at no additional cost to the district.

Recommendation	2001-2002	2002-03	2003-04	2004-05	2005-06
Implement a system of performance-based budgeting and invest in performance-based budgeting training for school district staff.	(\$1,425)	\$0	\$0	\$0	\$0

Chapter 7

FINANCIAL MANAGEMENT

B. Accounting Operations

FWISD's accounting operations are handled in the Accounting department, which include the general accounting functions of grants accounting, nutrition services accounting, fixed asset accounting and bank reconciliation preparation. The director of Accounting handles the day-to-day activities of the department, while the majority of the general accounting functions are performed under the direction of the accounting manager. Staff in the Accounting department also assists with the preparation of the Comprehensive Annual Financial Report. The payroll and accounts payable supervisors also report to the director of Accounting.

Six accountants in the department handle grants management in addition to the other general accounting functions. A grants coordinator in the Research and Evaluation department assists departments and schools in seeking competitive grants, those grants that must be approved by the grantor organization, for the district. Once the district receives grant approval, the director of Budget Operations establishes a budget for the grant. Grant accountants are responsible for monitoring grant expenditures and filing required grant reports.

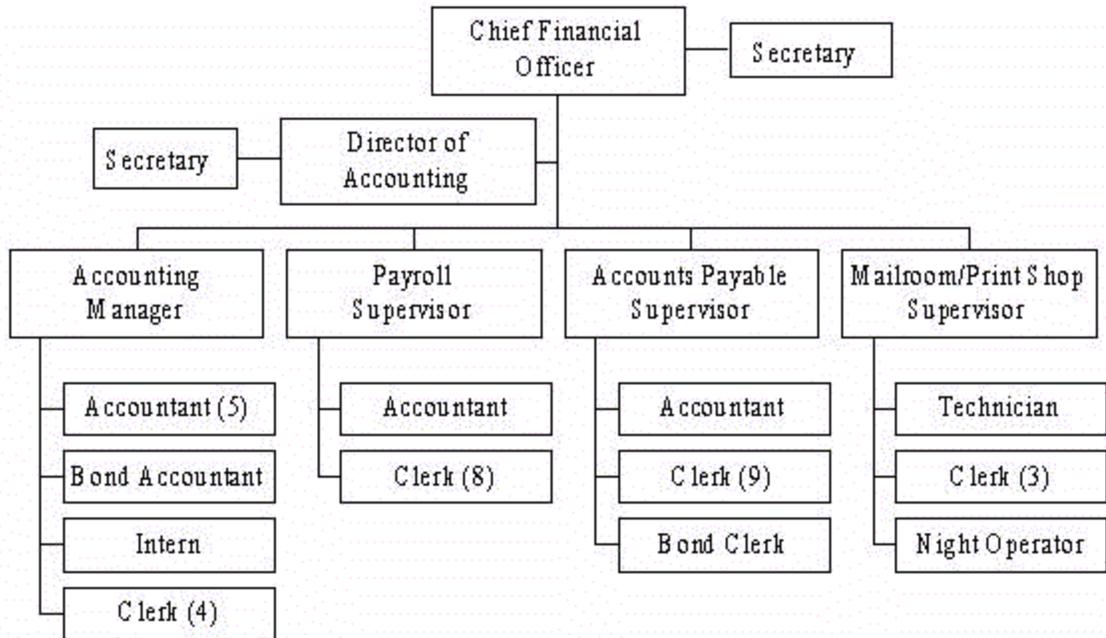
One and one-half FTEs are responsible for nutrition services accounting which includes issuing monthly and annual reports to the TEA, recording and reconciling all nutrition services activity into the district's general ledger, recording all inventory transfers and adjustments and ensuring that all cash deposits are recorded and accounted for.

The fixed asset accountant in the department reconciles the fixed asset accounts of the district, including recording additions and deletions to the fixed asset inventory. Two accountants prepare bank reconciliations for all district bank accounts. Fixed assets and cash management are reviewed in other chapters of this report.

As shown in **Exhibit 7-15**, the Payroll department includes a supervisor, a payroll accountant, and eight payroll clerks who process payroll transactions for approximately 11,860 full-time, part-time and temporary employees. Employees are paid through one of two payment cycles: professional, clerical and custodial staff are paid monthly on the last day of each month, and hourly employees, with the exception of custodians, are paid semi-monthly on the 15th and last day of each month. FWISD's employees have the option of getting paid through direct deposit to their

bank accounts; 4,829 employees (41 percent) are receiving pay through direct deposit.

Exhibit 7-15
Organizational Structure of
FWISD's Accounting Department
November 2000



Source: FWISD's Accounting department.

The department also conducts employee salary verifications; processes employee deductions such as insurance payments, garnishments, charitable contributions, child support payments and W-2s.

Most district employees' time records are submitted to the Payroll department on payroll transmittal sheets. Payroll department clerks review the transmittals and enter the data from the form into the CIMS III payroll system. Transportation department employees, however, use a timekeeping system called Kronos. The Kronos system allows an employee to "scan" an identification badge in a timekeeping device upon arrival and departure from work and is automatically uploaded to the CIMS III payroll system.

The district also uses an automated timekeeping substitute system designed by Telecommunications Support Systems, Inc. (TSSI). The TSSI system is a telephone call-in system requiring users to call into the system and logon using a personal identification number. When a teacher calls into the system to report an absence, the system automatically calls a list of substitutes until a replacement can be found. All non-teaching

employees are also required to use the system to report absences. Before a payroll is run, all information from the TSSI system is uploaded into the CIMS III payroll system. The TSSI system captures leave information for all employees and payroll information for substitute teachers so that this data does not have to be keyed manually.

The Accounts Payable department, as shown in **Exhibit 7-15**, is staffed with a supervisor, a full-time accountant, nine accounting clerks and a bond clerk. The department is responsible for processing all payments for the district. The department staff usually receives vendor invoices through the mail, but can sometimes receive them from schools and departments when the vendor sends the invoice to the user rather than the Accounts Payable department. All invoices are filed alphabetically until they can be processed. Invoices cannot be processed until a purchase order is received from the Purchasing department and the user department receives the goods. Effective November 6, 2000, all receiving is done by departments on-line through the CIMS III electronic receiving system.

FINDING

With the exception of competitive grants, FWISD's grant application process is not centrally coordinated. Competitive grants in the district require prior board approval and processing through the grants coordinator in the Research and Evaluation department. This lack of coordination results in many individual schools seeking their own grants without the grants coordinator's knowledge and in grants that are relatively small dollar. In many cases, Accounting and Budget staff only find out about these grants when school personnel begin expending grant funds or when unidentified grant funds are received. The lack of a coordinated system causes unnecessary work for the Accounting and Budget staff who must track down unknown grants and expend valuable staff time on relatively low dollar grants.

Exhibit 7-16 shows the 12 smallest grants in the district by dollar amount.

Exhibit 7-16
Dollar Value of FWISD's 10 Smallest Grants
As of August 31, 2000

Grant Name	Grant Amount
Effective Early Intervention Program	\$3,000
Arts Council	\$3,716
PSI Gold	\$1,990
Palmras Grant	\$2,500

Ageton Arts	\$5,000
Jordan Fundaments	\$2,500
Texas Commission of the Arts	\$2,073
Collaborative Team Building	\$1,762
Marooni/Real Tech	\$5,000
Pace Project (Harvard)	\$1,460
Arts in Education	\$1,000
Arts in Education - Music	\$1,000

Source: FWISD Budget department, November 2000.

The Research and Evaluation department does not serve as the clearing house for all grants. Ysleta and Socorro ISDs, for example, both centralize their grant programs enabling them to maximize grant funding opportunities.

Recommendation 71:

Require that all grant applications be approved by the grants coordinator in the Research and Evaluation department.

By coordinating the approval of all the district's grants, the district would be better informed and would reduce the number of relatively low-dollar grant awards that are costly to maintain.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer and the director of Accounting meet with the director of Research and Evaluation and the grants coordinator to discuss coordination.	July 2001
2.	The director of Research and Evaluation directs the grants coordinator to act as the "clearing house" for all grant applications in the district.	July 2001
3.	The director of Research and Evaluation notifies all district personnel of the process for grant applications.	July 2001
4.	All district staff submit grant applications to the grants coordinator for tracking and monitoring purposes.	August 2001
5.	The grant coordinator notifies the director of Budget Operations and the director of Accounting of all grant awards received.	Ongoing

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

The district is not maximizing the use of available technology to streamline the payroll process. FWISD's Transportation department uses Kronos, an electronic time and attendance system for its hourly employees. Other hourly employees in the district such as custodians and food service workers still complete manual timesheets or punch manual time clocks. These timesheets are manually calculated by a clerk in the department where the employee works, and are submitted to the Payroll department. Payroll department staff must then enter all hours worked for the hourly employees and verify that gross pay was calculated correctly.

The Kronos system is capable of tracking employee attendance through magnetically encoded identification badges that are "scanned" into time keeping machines located in the Transportation department. The system calculates the number of hours worked each day by hourly Transportation department employees and interfaces with the CIMS III payroll module, thereby reducing the number of hours Payroll staff spend to process payroll.

Benefits of the Kronos system include:

- recording time and attendance immediately and accurately;
- allowing staff real-time access to leave balances;
- reducing the amount of paper processed;
- reducing the errors of recording and calculating employee time and leave;
- applying pay rules and policies consistently to all employees; and
- providing audit trails for any adjustments or changes made to employee records.

Employees in the Payroll department report that since the implementation of the Kronos system, the amount of time spent processing the hourly Transportation payroll has decreased dramatically. In addition, staff report that data entry errors are greatly reduced since Kronos has been in use.

Staff also report that the manual data entry and verification necessary for hourly workers causes them to work excessive overtime hours. **Exhibit 7-17** shows the overtime hours worked by Payroll department staff since 1997. An average overtime rate was calculated to estimate the average overtime expenses incurred by the department. Only three months of data for fiscal 2001 was available so this figure was annualized. Because

Payroll department employees work unusually high overtime at the start of school, the first month of each fiscal year was excluded and the hours were annualized for this calculation.

**Exhibit 7-17
Average Overtime Expenditures For
FWISD's Payroll Department Staff**

	1997-1998	1998-1999	1999-2000	2000-2001
Total overtime hours worked	1,406	1,986	1,568	650 ^(a)
Annualized overtime hours worked excluding September ^(b)	1,160	1,834	1,340	2,223 ^(c)
Average overtime rate ^(d)	\$17.70	\$17.70	\$17.70	\$17.70
Total average overtime paid	\$20,532	\$32,462	\$23,718	\$39,347
Four-year Average annual overtime paid	\$29,015	\$29,015	\$29,015	\$29,015

(a)Represents the months of September, October and November only.
 (b)The months of September for each year are excluded in this calculation because the first month of the fiscal year typically will involve excessive overtime in establishing new employee records for the new school year.
 (c)Annualized based on total hours worked during the months of October and November, 2000.
 (d)Based on current salaries of current employees.

Source: FWISD's Business/Financial Services department, December 2000.

Recommendation 72:

Use the Kronos timekeeping system for all district hourly staff.

Using the Kronos time-keeping system for all hourly employees will reduce the amount of time spent by the payroll staff in data entry for payroll transactions. In addition, the use of Kronos will help to reduce the amount of clerical errors made when entering hourly payroll data manually.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer meets with the chief information officer to discuss expanding Kronos.	June 2001
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2.	The chief financial officer meets with all department heads affected by the implementation of Kronos.	June 2001
3.	The chief financial officer develops procedures for all employees regarding the use of Kronos system.	June 2001
4.	The chief financial officer develops an implementation plan and timeline for the districtwide implementation of Kronos.	July 2001
5.	The district implements the Kronos timekeeping system for all hourly employees and overtime for Payroll department staff is reduced.	September 2001
6.	The payroll supervisor documents all instances of district employees not using the Kronos system properly and reports this information to the chief financial officer.	October 2001 and Ongoing
7.	The chief financial officer enforces the Kronos use policies.	November 2001 and Ongoing

FISCAL IMPACT

The district has already invested in the base technology and software licenses necessary to operate the Kronos system. However, there will be additional costs associated with the implementation of districtwide use of the Kronos system for all hourly employees. The district will have to install scanners at all schools so that cafeteria and custodial employees can clock-in upon their arrival to work. The district already has 20 scanners. The vendor estimated the one-time cost for an additional 100 scanners at \$145,000.

With the districtwide implementation of the Kronos system, overtime for Payroll department employees would be reduced, which will save approximately \$29,000 annually as shown in **Exhibit 7-17**.

Recommendation	2001-2002	2002-03	2003-04	2004-05	2005-06
Purchase Scanners	(\$145,000)	\$0	\$0	\$0	\$0
Reduce Overtime	\$29,000	\$29,000	\$29,000	\$29,000	\$29,000
Net Savings/(Costs)	(\$116,000)	\$29,000	\$29,000	\$29,000	\$29,000

FINDING

FWISD employees are not using the Telecommunications Support System (TSSI) system to report absences properly which results in excessive manual data entry for Payroll department staff. The TSSI system exists to capture the absences of district employees. Proper use of the system is that

district staff call into the TSSI system to report absences so that time and attendance records can be automatically uploaded into the CIMS III payroll system.

Payroll department staff report that a large number of employees are either not using the system at all or are not using the system properly. Some schools, for example, don't use the system for reporting teacher absences and finding a substitute. However, the system is not used properly by many district staff who prefer to submit leave in paper form. In fact, one district director stated that they did not use the TSSI system for reporting absences because they just didn't like the system.

All employees are trained to use the system during new employee orientation. However, no districtwide policy mandating its use exists. The Payroll department does not document the problems associated with the TSSI system so the problem is difficult to quantify and address by upper management.

Recommendation 73:

Establish and enforce a use policy for the Telecommunications Support System and eliminate the manual data entry of payroll information.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer establishes a use policy for the TSSI system.	June 2001
2.	The chief financial officer distributes the policy to all district employees.	July 2001
3.	The chief financial officer directs the Payroll supervisor to document all instances of improper use of the TSSI system.	Ongoing
4.	The chief financial officer enforces the TSSI use policies.	Ongoing

FISCAL IMPACT

The implementation of this recommendation would result in the elimination of overtime worked by the Payroll department staff on this matter. However, this fiscal impact of overtime elimination is accounted for in another recommendation in this report.

Chapter 7

FINANCIAL MANAGEMENT

C. Student Activity Funds

School districts must account for student-generated money through separate accounts called activity funds. Activity funds include money that principals are allowed to control and spend as needed for the purposes for which the funds were generated, such as for student clubs and groups. Districts generally maintain separate bank accounts for these funds. Some districts centralize activity fund accounting in the district's finance or business office, while other districts permit individual schools to account for these funds. All Texas school districts are required to include activity funds in the annual financial audit conducted by independent auditors.

TEA's *Financial Accountability System Resource Guide (FASRG)* outlines the requirements for student activity fund accounting. Three categories of funds-general, special revenue and agency funds- may be used to record student activity money. According to the *FASRG*, the school district's use of this money should dictate which fund is used to record receipts. The general fund accounts for general use monies; special revenue funds track student activity monies that will benefit the school at large; and if financial decisions related to the funds rests solely with the students, then the funds should be accounted for in agency funds.

Student activity funds in FWISD are referred to as internal finance funds and accounted for as agency funds in the annual financial statements. In 1999-2000, the district reported approximately \$1.1 million in student activity funds. For the most part, financial secretaries or bookkeepers in schools administer and account for internal finance funds. However, some administering of these funds are performed centrally by the Accounting department. They include the filing of quarterly sales tax returns to the state and the tracking and annual issuance of Internal Revenue Service Form 1099s to unincorporated vendors. In addition, the Accounting department reviews the internal finance funds bank statement prior to sending it to school financial secretaries or bookkeepers.

The Internal Audit department oversees the internal finance funds. The internal finance fund specialist in the department reviews monthly bank reconciliations and trial balances-accounting system's account balance-and auditors audit each school on a regular basis. The Internal Audit department has an internal finance fund specialist who provides direct assistance to school bookkeepers by providing counseling and training on an as-needed basis. The internal finance fund specialist also provides assistance to school bookkeepers regarding computer or system issues.

In 1998, the Internal Audit department began converting the manual accounting systems at each school to automated systems. The system currently being implemented is called School Books, developed by a California-based company. School Books is a Windows-based system that tracks details of deposits and expenditures, and automatically links these transactions to the general ledger. The system is also capable of printing purchase orders and checks.

To date, 69 out of 120 FWISD schools are using the School Books system. The remaining schools will implement the automated system over the next two years.

FINDING

Schools are not able to complete bank reconciliations in a timely manner due to lengthy delays in the processing of bank statements by the Accounting department. This results in delayed information about the financial status of the internal finance funds.

The district has a depository contract with BankOne to maintain a single internal finance funds bank account into which all schools deposit funds and draft checks. Bank activity for each school is tracked by school location codes pre-printed on all checks and deposit slips. There are typically about 125 schools that deposit to the internal finance funds bank account.

The processing of the bank statements is very lengthy and detailed, which takes a lot of staff time. Following the close of bank activity each month, BankOne sends a magnetic tape and all cancelled checks and deposit slips for the internal finance funds bank account to the district's Accounting department. An accountant in the department is responsible for having the information from the tape loaded into a customized bank reconciliation program in the CIMS III financial system. The bank activity is then sorted by school location and reviewed in detail. Each check is reviewed by either an accountant or an accounting clerk to determine whether it contains the proper signatures. In addition, all cancelled checks and deposit slips are compared to the bank listing to ensure that activity is accounted for in the proper location. Should the accountant find any discrepancies, corrections can be made to the bank statement.

After the accountants complete the bank statement review, the bank statements are printed according to school location code and sent to the appropriate schools. Accounting staff interviewed indicate that it takes approximately 50 percent of a full-time accountant position and 100 percent of a part-time accounting clerk position to review, correct, and sort the bank activity each month.

Exhibit 7-18 shows a recent history of dates that tracks turn-around times in this process.

**Exhibit 7-18
FWISD Bank Statement Turn-Around Time
Internal Finance Funds**

Month Ending Date	Date Bank Statement Sent to Schools	Number of Calendar Days
01/31/98	04/23/98	82
02/28/98	05/07/98	68
03/31/98	05/15/98	45
04/30/98	05/27/98	27
05/31/98	08/21/98	82
06/30/98	08/24/98	55
07/31/98	11/05/98	97
08/31/98	11/30/98	91
09/30/98	12/10/98	71
10/31/98	02/01/99	93
11/30/98	02/23/99	85
12/31/98	03/29/99	88
01/31/99	04/05/99	64
02/28/99	04/29/99	60
03/31/99	05/18/99	48
04/30/99	06/02/99	33
05/31/99	09/02/99	94
06/30/99	10/04/99	96
07/31/99	11/09/99	101
08/31/99	12/01/99	92
09/30/99	01/04/00	96
10/31/99	01/26/00	87
11/30/99	03/22/00	113
12/31/99	03/30/00	90

01/31/00	05/01/00	91
02/29/00	05/04/00	65
03/31/00	05/16/00	46
04/30/00	06/19/00	50
05/31/00	08/08/00	69
06/30/00	08/24/00	55
07/31/00	08/31/00	31
08/31/00	10/16/00	46
Average Number of Days		72.2

Source: Internal Audit tracking data, November 2000.

As this exhibit shows, the Accounting department's shortest turn-around time over this period is 27 days and average turn-around time is 72 days.

Slow turn-around times impedes the schools' ability to detect common errors and irregularities in bank statements. For example, during fiscal 1999, a school bookkeeper was able to "borrow" funds from the internal finance funds accounts and go undetected because of the delay in getting the bank statements. In addition, final year-end school financial statements are delayed by this problem.

Recommendation 74:

Eliminate the excessive review of the internal finance funds bank statement by the Accounting department and submit to schools within two days of receipt.

The Accounting department should develop new procedures for handling the internal finance funds bank statement information. The department should focus on sorting bank activity by school location and printing each bank statement so that schools can receive them in a timely manner. The review for proper signatures is a function that can be streamlined. For example, the accountant could select a sample of checks to review, or review all checks over the amount of \$10,000, to ensure proper procedures by the schools. In addition, this type of review can be performed once rather than monthly during the annual audit of each school. Implementation of this recommendation will allow staff in the Accounting department to spend their time on other important internal finance funds monitoring.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Accounting adopts a standard turnaround time of two days for processing school internal finance funds bank statements.	June 2001
2.	The director of Accounting develops streamlined procedures for printing bank statements and forwarding them to schools.	June 2001
3.	The director of Accounting implements and monitors the new procedure.	July 2001

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

Check signing policies for internal finance funds are causing schools and Accounting department staff to spend excessive time on relatively low-dollar items. Internal finance funds policy section 3.2 states the following:

All disbursement checks must be signed with two manual signatures. In the event of the absence of the principal and/or the financial clerk due to illness or other justifiable reason, other than inconvenience, the director of Accounting and the General Accounting manager are authorized to sign for either party.....All checks exceeding \$10,000 must have three signatures: (1) Principal; (2) Financial Clerk; (3) Director of Accounting.

District policy prohibits temporarily assigned employees from signing internal finance funds checks. As a result, some schools that have temporary bookkeepers or principals are required to hand-deliver all checks to the Accounting department for signature.

A review of bank statements for 10 schools for October 2000 shows that out of 355 checks that cleared the bank, 330 (93 percent) were for less than \$500. **Exhibit 7-19** shows a breakdown of this analysis.

Exhibit 7-19
Analysis of FWISD's Internal Finance Funds Checks

School Name	Total Number of Checks for October 2000	Number of Checks \$0-\$49	Number of Checks \$50-\$99	Number of Checks \$100-\$199	Number of Checks \$200-\$499	Number of Checks \$500 and above

Boulevard Heights ES	11	6	4	1	0	0
Natha Howell ES	16	9	0	6	1	0
Westcreek ES	8	5	2	0	1	0
Carter-Riverside MS	44	25	8	3	6	2
Dunbar MS	9	6	2	1	0	0
J.P. Elder MS	10	5	2	0	3	0
Meadowbrook MS	13	8	1	1	3	0
Arlington Heights HS	74	21	16	17	13	7
Paschal HS	110	32	28	21	17	12
Southwest HS	60	22	12	13	9	4
Totals	355	139	75	63	53	25

Source: Internal Finance Fund bank statements for October 2000 for the schools noted.

Recommendation 75:

Amend check-signing policies to streamline the disbursement process for internal finance funds.

The district should consider the cost in staff time of having such tight controls on the check signing process for internal finance funds. A policy requiring only one signature for checks up to the amount of \$500, two signatures for checks between \$501 and \$9,999, and three signatures for checks over \$10,000 would ease the burden on school staff and make the disbursement process more efficient.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Accounting amends the check signing policies in the internal finance funds manual.	June 2001
2.	The director of Accounting notifies all school bookkeepers and financial secretaries of the change in policy.	June 2001

3.	The policy becomes effective.	August 2001
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FISCAL IMPACT

This recommendation can be implemented using existing resources.

Chapter 7

FINANCIAL MANAGEMENT

D. Internal and External Audit

Internal audits are a major element of management and internal control. Within a school district, internal audit departments evaluate the district's organizational units, and their compliance with board and administrative policies and procedures, as well as federal, state, and local government laws and guidelines.

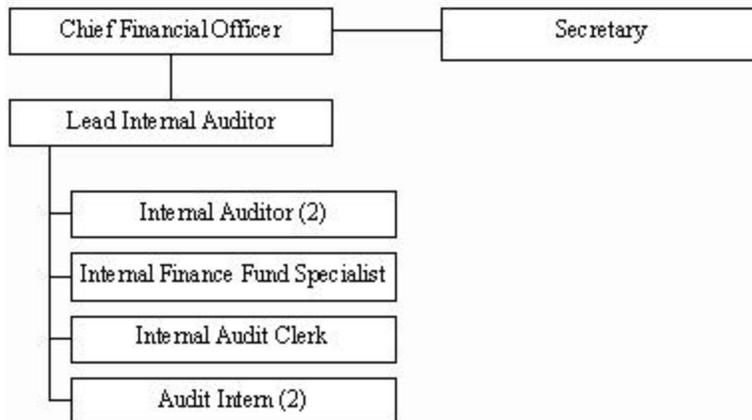
Recently, internal audits have focused on management performance and operational reviews and the efficiency and effectiveness of the financial activities of a school district. Texas State Auditor's Office Report No. 3-010 recommends that all school districts with annual operating expenditures of at least \$20 million or enrollment of more than 5,000 students have an internal audit function.

In addition to internal audits, Texas Education Code Section 44.008 requires school districts to undergo an annual external audit of their financial statements. The Code specifies that external audits must be performed by a certified public accountant, and that the audit must comply with generally accepted accounting principles (GAAP).

Internal Audits report to the chief financial officer. The organizational chart in **Exhibit 7-20** shows a lead internal auditor, two staff auditors, an internal audit clerk, and an internal finance fund specialist. In addition, the Internal Audit department also has intern positions, two during the summer and one during the school year. Interns work 12 to 15 hours weekly. The internal finance fund specialist position was created in 1999 to provide support to school bookkeepers and financial secretaries in the implementation and use of internal finance funds accounting systems, reconciling bank statements, and preparing monthly reports. The internal finance fund specialist also provides training to all school bookkeepers.

Exhibit 7-20
FWISD's Internal Audit Department
Organizational Structure

October 2000



Source: FWISD's Internal Audit department, October 2000.

A majority of the department's time is spent auditing internal finance funds at schools. Each school receives an audit regularly; high schools are audited annually, middle schools are audited biannually, and elementary schools are audited every three to four years. In addition, any school that changes principal or bookkeeper receives an audit at the time of the personnel change.

Exhibit 7-21 shows the percentage of department staff time spent on various functions since September 1998. As the exhibit shows, a significant portion of hours (64 percent) are devoted to the audit of internal finance funds.

**Exhibit 7-21
FWISD's Internal Audit Department Allocation of Time
September 1998 through August 2000**

Function/Activity	Percent of Time
Student Activity Fund Audits and Investigations	64 %
Student Activity Fund Operational Functions	14 %
Administrative Functions	8 %
Other District Audits and Investigations	10 %
Other District Operational Functions	4 %
Total	100 %

Source: Internal Audit department, November 2000.

Operational functions for student activity funds include conducting training, providing assistance to bookkeepers and reviewing monthly reports. The administrative functions include staff development time and staff meetings.

About 10 percent of the department's time during this period was spent on district audits or investigations. These include observation of regular inventory counts in the district's warehouses, observation of paycheck distribution, audit of election results, audits of the Adult Education department and a Quality Fund review.

Deloitte and Touche LLP, an international accounting firm, performs the external annual financial and compliance audits. At least since 1997, the district has received unqualified audit opinions with the exception of fiscal 1999. The district received a qualified opinion due to Year 2000 issues. In addition to issuing an opinion on the financial statements, Deloitte and Touche provides an annual management letter. **Exhibit 7-22** details FWISD's management letter comments since 1997, which represent the auditor's findings from conducting the external audit.

Exhibit 7-22
FWISD's Management Letter Comments
1997 through 1999

Fiscal Year Ending 8/31/97	Fiscal Year Ending 8/31/98	Fiscal Year Ending 8/31/99
<ul style="list-style-type: none"> • Disallowed securities • Violation of investment policy • Reconciliation of monthly investment report • Insufficient pledged securities • Fixed asset reconciliation • Internal service fund • Food service budget • Food service 	<ul style="list-style-type: none"> • Risk assessment • Internal controls over newly installed systems • Contract vs. employee status • 403(b) contributions • Food services fund balance • Compliance with prompt payment act • Internal service fund • Reconciliation of investments to monthly investment report 	<ul style="list-style-type: none"> • Investment policy • Business continuity • Implementation of changes made to data processing applications • Delivery of software source codes • Programmer access to system • New accounting standards - GASB 34

<ul style="list-style-type: none"> • fund balance • Compliance with prompt payment act • Pension disclosure • Fair value reporting of investments • Year 2000 issues 	<ul style="list-style-type: none"> • Fixed asset reconciliation • Food service daily reports • Grant reporting • Year 2000 issues 	
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Source: Deloitte & Touche LLP Report to Management for the years indicated.

The district's Budget/Audit Committee meets annually at the completion of the external audit to review the financial results and to take action on the auditor's management recommendations.

FINDING

Exhibit 7-21 shows that the Internal Audit department spent time during the two-year period between 1998 and 2000 performing operational functions including:

- training school bookkeepers;
- providing assistance to school bookkeepers;
- providing proofreading assistance with the bond proposal;
- assisting with print shop accounting functions; and
- sitting on the Purchasing bid appeals panel.

Standards promulgated by the Institute of Internal Auditors (IIA) require auditors to be independent of the activities they audit and to maintain a high degree of objectivity. The department's involvement in bookkeeper training, bookkeeper assistance and the performance of other operational duties impairs its independence and objectivity when conducting audits.

Recommendation 76:

Transfer the operational responsibilities of the Internal Audit Department to the Accounting department to maintain the independence and objectivity of the audit function.

The Internal Audit department should focus on conducting audits of the district's activities. By providing operational assistance to other district

departments, the auditors' independence is compromised when they audit these functions.

To enhance the independence and objectivity of the department, all operational activities should be transferred to the Accounting department, including all bookkeeper training and assistance for internal finance funds. To facilitate the transfer of responsibilities, the internal finance fund specialist position should report to the Accounting department.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer directs the lead internal auditor to transfer all internal finance fund operational functions and specialist position to the Accounting department.	June 2001
2.	The chief financial officer assigns other operational responsibilities to the Accounting department.	June 2001

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

FWISD does not have an audit committee to assist in the financial management of the district. Although the Budget/Audit Committee receives and reviews the annual audit prepared by the independent auditor, the committee has no involvement in establishing audit goals and objectives for the district.

Many local governments maintain audit committees for the purpose of reviewing and considering internal as well as external audit matters. Typical audit committees are made up of community members whose primary focus is to assist the school board in carrying out its responsibilities on internal control, financial reporting practices, and accounting policies. Many entities have an organizational structure that has the Internal Audit department reporting to the governing board through the audit committee. Audit committees are useful in helping establish audit goals, evaluating and approving annual audit plans, evaluating potential risks, reviewing audit findings, and developing plans to address concerns raised in audit findings.

Recommendation 77:

Create a board Audit Advisory Committee to advise the board in matters pertaining to the district's internal and external audit functions.

The board should appoint community members to serve on the Audit Advisory Committee. Each board member should appoint one community member who is either a Certified Public Accountant (CPA) or a business leader to serve three-year terms on the committee. In the first year, member terms should vary in length so that the three-year terms expire in staggered years.

Committee members should have an in-depth knowledge of the operation of the school district, relevant experience, and commitment to serving the district's best interests.

The committee should meet monthly. Responsibilities of the Audit Advisory Committee should include the following:

- review the internal auditor's annual audit plan and make recommendations concerning areas to be emphasized;
- evaluate the effectiveness of the internal audit plan;
- review the external auditor's annual management letter;
- monitor implementation of internal and external audit recommendations;
- review policies and procedures affecting the financial areas; and
- participate in the selection process of independent auditing firms.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board adopts a mission statement, goals and objectives for the Audit Advisory Committee.	June 2001
2.	The board appoints business leaders and CPA's in the community to serve on the Audit Advisory Committee. Each board member makes an appointment.	June 2001
3.	The board holds the first meeting of the Audit Advisory Committee.	August 2001
4.	The Audit Advisory Committee meets to elect a chairperson and secretary.	August 2001
5.	The Audit Advisory Committee meets monthly.	September 2001 and monthly thereafter

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

FWISD's Internal Audit department does not function independently from the general operations of the district. Internal audits of school district should be conducted independently and free from direction or constraint of district department managers. Auditors should not fear retribution or be influenced by management to report findings in a favorable light. In addition, internal auditors should maintain independence so employees who report instances of fraud or abuse to the audit team do not feel threatened in doing so.

In FWISD, the Internal Audit department reports to the chief financial officer. Operational functions of the district including risk management, budget, purchasing, accounting, payroll, accounts payable, grants, and investment activities are all directed by the chief financial officer. Hence, any audit of these departments would be a conflict of interest for the Internal Audit department.

Recommendation 78:

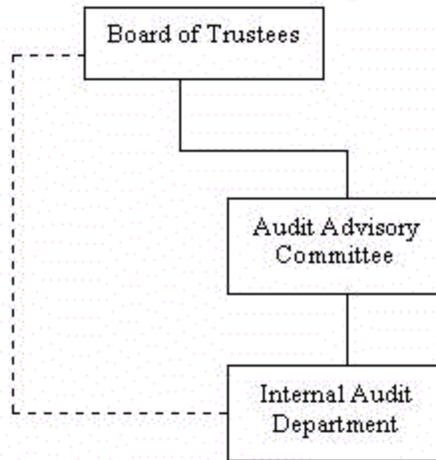
Restructure the Internal Audit department to report directly to the board.

The board should take immediate action to create a more independent internal audit department by directly reporting to the board rather than the chief financial officer.

The proposed organizational chart in **Exhibit 7-23** shows a recommended reporting structure for the Internal Audit department.

Exhibit 7-23 Proposed Organizational Chart For

FWISD's Internal Audit Department



Source: Gibson Consulting Group, Inc., December 2000.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board reorganizes the Internal Audit department to report directly to the board.	July 2001
2.	The Internal Audit department begins new reporting structure.	September 2001

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

FWISD's Internal Audit department does not have an audit charter. Section 110.01.4 of IIA Standards for the Professional Practice of Internal Auditing require that all internal audit organizations have a formal written charter to define the department's purpose, authority and responsibility.

The purpose, authority, and responsibility of the internal auditing department should be defined in a formal written document (charter). The director should seek approval of the charter by senior management as well as acceptance by the board. The charter should (a) establish the department's position within the organization; (b) authorize access to records, personnel, and physical properties relevant to the performance of audits; and (c) define the scope of internal auditing activities.

a. The director of internal auditing should periodically assess whether the purpose, authority, and responsibility, as defined in the charter, continue to

be adequate to enable the internal auditing department to accomplish its objectives. The result of this periodic assessment should be communicated to senior management and the board.

Recommendation 79:

Adopt a charter for the Internal Audit department that details the department's purpose, authority and responsibility.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The lead Internal Auditor drafts an audit charter, incorporating the IIA Standards for the Professional Practice of Internal Auditing.	June 2001
2.	The chief financial officer and the superintendent review and approve the audit charter.	July 2001
3.	The superintendent submits the charter to the board for adoption.	July 2001
4.	The board reviews and adopts the new internal audit charter.	August 2001

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

FWISD's internal auditors audit functions that represent relatively minimal risk exposure for the district, which leaves other higher risk activities unaudited. As **Exhibit 7-21** shows, 64 percent of the Internal Audit department's workload from September 1998 through August 2000 related to student activity fund audits, despite the fact that student activity funds make up less than 1 percent of the district's total assets. Only 10 percent of the department's workload involves other district audits and investigations.

FWISD does not conduct a regular risk assessment of its organization and operations, programs, systems, and controls. Risk assessments are effective tools to aid auditors in determining which activities or functions to audit, and how much time should be devoted to each. Without a risk assessment, auditors may allocate time to auditing functions that have relatively little risk exposure for the district, which leaves other higher risk activities unaudited.

Recommendation 80:

Conduct an annual risk assessment to determine annual audit objectives and allocate audit hours accordingly.

The Internal Audit department's plan of engagements should be based on a risk assessment. The risk assessment process, to be conducted at least annually, should include an assessment of relevant risks and their significance; consideration of senior management's, the board's, and the lead auditor's professional judgment; and the identification of activities to be audited.

A risk assessment should evaluate the following:

- Information systems environment;
- Reliability and integrity of financial and operational information;
- Effectiveness and efficiency of operations;
- Safeguarding of assets; and
- Compliance with laws, regulations, and contracts.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The lead internal auditor develops a risk assessment plan and presents it to the board.	October 2001
2.	The board reviews and approves the risk assessment plan.	October 2001
3.	The lead internal auditor begins conducting the risk assessment.	November 2001
4.	Based on the results of the risk assessment, the lead internal auditor develops an audit plan for the remainder of the fiscal year.	December 2001

FISCAL IMPACT

This recommendation can be implemented using existing resources.

Chapter 8

PURCHASING AND WAREHOUSING

This chapter reviews the Fort Worth Independent School District's (FWISD) purchasing and warehousing functions in three sections:

- A. Purchasing
- B. Warehouse Services
- C. Textbooks

An efficient purchasing and warehousing function should have management processes in place to ensure that supplies, equipment and services vital to the school system's education mission are purchased from the right source, in the right quantity, at the lowest price, are properly stored and are delivered timely to the appropriate location. These criteria should be met for each purchase without sacrificing quality and timely delivery.

Chapter 8

PURCHASING AND WAREHOUSING

A. Purchasing

In 1995, the Texas Education Code (TEC) was revised to include changes in state purchasing regulations designed to provide the best value to school districts through a competitive bidding process. Generally, when districts purchase items valued at \$25,000 or more (or multiple like items with a cumulative value of more than \$25,000 in a twelve month period), one of the competitive bid processes shown below must be followed:

- Competitive sealed proposals: vendors submit a written bid, and all submitted bids are publicly opened to ensure fairness in the bidding process.
- Requests for proposals: vendors submit a written bid, and all submitted bids are opened as they come in.
- Purchased from the state catalogue: vendors that have completed competitive bid requirements at the state level and can sell products directly to districts.
- Procured through an inter-local contract: board-approved agreements with a local entity that allows the district to purchase specific items from that entity's bid.
- Through a design/build contract: vendor has been selected for a competitive bid to complete an entire project; it is the vendor's responsibility to obtain merchandise for the project.

In 1999, the Office of the Attorney General issued an opinion (Op. JC-37) stating that school district procurement through an inter-local agreement or a cooperative purchasing arrangement satisfies competitive bidding requirements.

School districts must 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 district's county. State law requires advertisements to specify the categories of property to be purchased and to solicit vendors that are interested in supplying them.

These methods are presented in detail in **Exhibit 8-1**.

Exhibit 8-1

Competitive Procurement Methods

Purchasing Method	Description
Competitive Bidding	Requires bids to be evaluated and awarded based solely upon bid specifications, terms and conditions contained in the request for bids, according to the bid prices offered by suppliers and pertinent factors affecting contract performance. Forbids negotiation of prices of goods and services after proposal opening.
Competitive Sealed Proposals	Requires the same terms and conditions as competitive bidding, but allows changes in the nature of a proposal and prices after proposal opening.
Request for Proposals	Generates competitive sealed proposals and involves several key elements, including newspaper advertisement, notice to proposers, standard terms and conditions, special terms and conditions, a scope-of-work statement, an acknowledgment form/response sheet, a felony conviction notice and a contract clause.
Catalog Purchase	Provides an alternative to other procurement methods for the acquisition of computer equipment, software and services only.
Inter-local Contract	Provides a mechanism for agreements with other local governments, the state or a state agency to perform governmental functions and services.
Design/Build Contract	Outlines a method of project delivery in which the school district contracts with a single entity to both design and construct a project.
Job order Contract	Provides for the use of a particular type of contract for jobs for minor repairs and alterations; typically used for jobs involving manual labor.
Construction Management Contract	Outlines the use of a contract to construct, rehabilitate, alter or repair facilities using a professional construction manager.

Source: Texas Education Agency's Financial Accountability System Resource Guide.

Exceptions to competitive bidding requirements include contracts for professional services, including architect fees, attorney fees and fees for fiscal agents. State law also allows a district to purchase items that are available from only one source ("sole-source" purchases) if certain criteria are met, including:

- An item for which competition is precluded because of the existence of a patent, copyright, secret process or monopoly;
- A film, manuscript or book;
- A utility service including electricity, gas, or water; or
- A captive replacement part or component for equipment (those that are specific to a particular piece of equipment and are not available from more than one vendor).

Sole source exceptions do not apply to mainframe data processing equipment and peripheral attachments with a single item purchase price in excess of \$15,000.

Exhibit 8-2 presents a summary of purchase and bid approval processes based on purchasing guidelines included in the Texas Education Code.

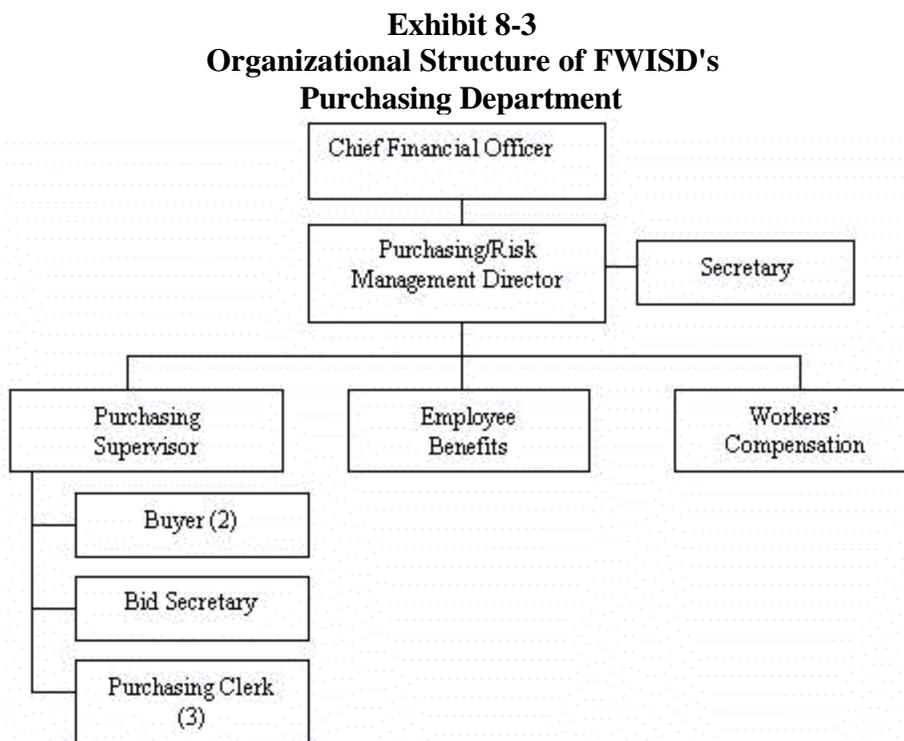
**Exhibit 8-2
Bid and Purchasing
Recommended Approval Process**

Purchase Levels	Bid Requirements (if no bid or contract exists)	Approval Requirements
Greater than \$25,000	Formal sealed bid	<ul style="list-style-type: none"> • User department/school approvals and • Purchasing director and • Superintendent or designee and • Board of Trustees
\$10,000 to \$24,999	Formal quotations from three vendors (written and sealed)	<ul style="list-style-type: none"> • User department/school approvals and • Purchasing director and • Superintendent or designee
\$5,000 to \$9,999	Quotations for three vendors (telephone, fax or written)	<ul style="list-style-type: none"> • User department/school approval and • Purchasing agent
\$40 to \$4,999	Quotations from one to three vendors (telephone, fax or written)	<ul style="list-style-type: none"> • User department/school approvals and • Purchasing clerk

Source: Texas Education Code 44.031(a); (b).

The Texas Education Agency (TEA) has developed a *Financial Accountability System Resource Guide* (FASRG) outlining purchasing and reporting requirements for Texas schools.

A purchasing department's responsibilities should include handling the major function of purchasing all materials, supplies, equipment and services for a school district and for upholding the integrity of the district's competitive bidding process. FWISD's Purchasing Department falls under the direction of the chief financial officer. Managed by a director and supervisor, the department has two full-time buyers, a bid secretary and three clerks. **Exhibit 8-3** shows the organizational structure of the department.



Source: FWISD Purchasing Department, November 2000.

In addition to handling the district's purchasing, the department is responsible for the administration of employee benefits and workers' compensation claims. These two functions are discussed in detail in Chapter 6, Asset and Risk Management, of this report.

The department's responsibilities include:

- Issuing Requests for Bids and Requests for Proposals;
- Processing and evaluating all bids and proposals received;
- Advertising bids in local newspapers and on Internet sites;

- Developing bid specifications;
- Reviewing, approving and distributing all purchase orders; and
- Establishing vendor records in the purchasing system.

In addition to these responsibilities, the department acts as a clearinghouse for all travel requests in the district. Two full-time equivalent (FTEs) employees handle travel for the department.

The district uses an integrated computerized purchasing system called the Comprehensive Information Management System (CIMS III). The CIMS III system provides integrated financial management for purchasing, accounting and budgeting.

All departments and schools in the district are responsible for the data entry of purchase orders. Upon entry of purchase order information, the CIMS III system encumbers the appropriate amount. An encumbrance entry provides for budgetary control by reserving a portion of an account's budget to cover an outstanding purchase order.

After entering a purchase order, the appropriate individual in a department or school electronically approves the purchase order. After site approval, all purchase orders are electronically sent to the Purchasing Department. The Purchasing supervisor prints out purchase order reports, conducts a cursory review and distributes the reports among staff for a more detailed review (**Exhibit 8-4**).

Purchasing staff approves, rejects or modifies each purchase order. Purchase orders awaiting bids or RFPs are placed on hold in the system. After the detailed review by the purchasing staff, purchasing clerks print all approved purchase orders. All approved purchase orders are then manually signed by the Purchasing supervisor and distributed. The original purchase order is sent to the vendor, and other copies are kept in the Purchasing and Accounts Payable Departments.

Exhibit 8-4
Work Load Distribution Among
FWISD's Purchasing Department Staff

Position	Responsibilities
Purchasing Director	Handles all non-traditional bids, Requests for Proposal, and copiers.
Purchasing Supervisor	Handles bid specifications and reviews purchase orders for classroom supplies, classroom furniture, office supplies, office furniture and nutrition services' food items and supplies.

Buyer I	Handles the bidding and review of all purchases of warehouse stock, printing supplies and tires.
Buyer II	Handles the bidding and review of purchase orders for athletic equipment and supplies, transportation equipment and supplies, maintenance supplies and computers and computer supplies.

Source: FWISD's Purchasing Department, November 2000.

Purchasing buyers identify items needing bids during their daily review of purchase orders. Once a decision is made to bid an item, the buyer develops bid specifications. The bid secretary is responsible for placing bid advertisements in local newspapers in accordance state law. In addition, FWISD lists bids with a subscriber service that advertises bids over the Internet.

Up until November 6, 2000, schools and departments received the "receiving" copy of their purchase orders. However, all departments and schools are now required to electronically receive all merchandise, eliminating the need to receive a paper copy of the purchase order. Electronic receiving requires the individual in the school or department with the receiving responsibility to enter the date and quantity of goods received online. The Accounts Payable Department uses this information to determine when payment for goods can be made.

State laws allow school districts to participate in catalog purchasing programs of the General Services Commission. In addition, other procurement options available to Texas school districts include inter-local agreements, sole source arrangements and cooperative purchasing.

Under an inter-local agreement, a district can contract or agree with another local government, including a nonprofit corporation that is created and operated to provide one or more governmental functions and services, to purchase goods and any services reasonably required for the installation, operation or maintenance of the goods. Selected purchases may be exempt from competitive procurement if they meet established criteria for a sole source purchase. These criteria include the identification and confirmation that competition in providing the item or product to be purchased is precluded by the existence of a patent, copyright, secret process or monopoly. To properly use the sole source arrangement, the school district must obtain and retain documentation from the vendor that clearly delineates the reasons that qualify the purchase to be made on a sole source basis. Texas school districts have a variety of cooperative purchasing opportunities available. Many of these opportunities are offered through the state's regional service centers.

In 1967, the State Legislature established 20 regional service centers to support statewide goals for school improvement. The service centers provide school districts professional training opportunities and technical assistance. FWISD is the largest school district in Regional Service Center 11. Region 11 serves 80 school districts in a 10-county area in north Texas.

FINDING

Purchasing Department staff do not regularly monitor the purchasing procedures used by schools and departments to ensure that all state, local and district policies are followed. Schools or departments buy goods and services without first obtaining the proper approval by submitting a purchase order request to the Purchasing Department. This omission violates district policy and places the district at risk of over spending its budget.

The Accounts Payable Department only superficially monitors purchasing activity. The process for handling such instances requires Accounts Payable staff to manually compare all purchase order dates to invoice dates. This process occurs only after a check has been printed. Upon identifying these instances, the check and all supporting documents are hand-delivered to the accounting manager for additional approval. Offending departments are not informed there is a problem.

The table in **Exhibit 8-5** shows a list of documents improperly processed. As the exhibit shows, the invoices are dated an average of 70 days prior to the date the purchase order was initiated.

Exhibit 8-5
Sample of FWISD Documents With
Invoice Dates Preceding Purchase Order Dates

Invoice Number	Invoice Date	Invoice Amount	Purchase Order Number	Purchase Order Date	Number of Days Invoice Date Precedes Purchase Order Date
098478	9/20/00	\$3,267	392941	12/14/00	85
98484	9/13/00	\$3,630	392943	12/14/00	92
100025	10/10/00	\$1,815	392940	12/14/00	65
100026	10/23/00	\$3,602	392482	12/14/00	52
0589500	9/27/00	\$15,000	391455	12/14/00	78

0589500	10/26/00	\$14,980	391457	12/14/00	49
Average number of days					70

Source: Accounts Payable Department invoice documentation, December 2000.

Recommendation 81:

Develop a process for monitoring purchasing procedures and enforcing the district's purchasing policies.

The Purchasing Department should begin to review those purchase orders in which invoice dates precede purchase order dates. With few modifications to the process for invoice payment, this review process can be automated. At the present time, clerks in the Accounts Payable Department do not enter invoice dates into the CIMS III system when paying invoices. By making this a mandatory entry field, this information can be captured by the system and then used to provide an analysis.

Reports showing all invoice dates that precede purchase order dates can be programmed by the Information Services Department to print regularly. Purchasing staff can then review the reports and address the problem with the appropriate district personnel. Regular reports to the chief financial officer, superintendent and school board will help ensure compliance with state laws and district policies.

In addition, purchasing staff should analyze the reasons why proper policy is not being followed. Trends may uncover areas needing efficiencies, problems with vendors or areas needing procedural changes.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Purchasing/Risk Management director meets with the Accounts Payable supervisor and the chief information officer to discuss the monitoring improvements.	June 2001
2.	The chief information officer, Purchasing/Risk Management director and the Accounts Payable supervisor meet with Information Services staff to design the exception reports.	June 2001
3.	The Accounts Payable supervisor trains data entry staff to use the "invoice date" field when entering invoices for payment.	July 2001
4.	The Accounts Payable supervisor monitors data entry to	July 2001

	ensure that data entry clerks follow the new procedure.	
5.	The Purchasing/Risk Management director directs the Purchasing supervisor to review the exception reports and address policy violations with appropriate departmental or school staff.	August 2001 and monthly thereafter

FISCAL IMPACT

This recommendation could be implemented using existing resources.

FINDING

FWISD's travel function is misplaced in the organization. Employees in the Purchasing Department are responsible for receiving and processing all travel requests. In addition, Purchasing Department employees are responsible for reconciling all expenditures listed on the travel form to expense receipts, verifying documentation was obtained and submitted, verifying proper department-level approval was obtained and verifying that funds are adequate to cover travel expenses. These functions are accounting functions that are more appropriately handled by the accounting staff in an organization.

FWISD's Accounting Department is staffed with accountants and accounting clerks that regularly conduct similar reconciling functions for bank accounts and general ledger accounts. Travel advance reconciling should be performed by an individual with an accounting background.

Recommendation 82:

Move the travel review process to the Accounting Department.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The Purchasing/Risk Management director meets with the director of Accounting to plan for the transition of travel responsibilities to the Accounting Department.	July 2001
2.	The travel process is assigned to the Accounting Department.	August 2001

FISCAL IMPACT

This recommendation could be implemented using existing resources in the Accounting Department assuming that other recommendations, such as streamlining the travel process, are also implemented.

FINDING

FWISD does not have standardized written procedures for district travel. In addition, employees do not receive training on district travel policies.

Without clear instructions on the district's travel policies and procedures, employees will continue to make errors when completing travel forms. During the on-site fieldwork for this performance review, the review team observed the purchasing clerk attempting to explain to several employees, both over the telephone and in person, why they had not completed the form properly. The frequent errors made on travel forms create inefficiencies and delays in the system.

Many districts use the State of Texas Travel Allowance Guide to help officers and employees comply with travel laws enacted by the Legislature. The guide is available online on the Texas Comptroller of Public Accounts' Web site (http://www.window.state.tx.us./comptrol/san/fm_manuals/tag_man/00tag_man/tag_toc.html), which is convenient for employees to look-up travel guidelines.

Recommendation 83:

Develop written procedures for district travel and provide training for employees.

Ensuring that travel procedures are well documented and that employees have received adequate training on those procedures will help ensure board policy is followed and increase efficiency.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The chief financial officer reviews the state's online travel guide to determine the feasibility of FWISD staff using it.	July 2001
2.	The chief financial officer instructs the director of Accounting to develop a list of steps for employees to use in the travel process.	July 2001
3.	The director of Accounting conducts training for all employees in district travel procedures.	August 2001

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

FWISD's process for handling travel in the district is cumbersome and inefficient. A review of travel documentation reveals the travel forms are handled multiple times and require multiple signatures for approval. Approvals noted on travel forms include multiple departmental level signatures, the Purchasing supervisor and the Accounting manager.

All travel information is recorded on an *Absence From Duty For Travel* form. User departments are responsible for completing the form, which contains information such as employee name, purpose of travel, mode of travel, registration fee information for seminars and conferences and expense codes for the travel. User departments are responsible for ensuring that the appropriate individual in the district has reviewed and approved the form in accordance with board policy. Review at the departmental level implies the employee has received proper approval and that departmental funding is adequate to cover the proposed travel expenditures.

All completed travel forms are then submitted to the Purchasing Department where the Purchasing supervisor conducts another review and approval of the form. After this review, the form is given to a Purchasing clerk who inputs it into the CIMS III travel module. Upon entry of a form into the CIMS III travel module, a unique tracking number is assigned and funds are encumbered. The travel module operates similarly to the CIMS III purchase order function, allowing employees online look-up capabilities to view the status on any given travel form.

In case of questions or problems with a travel form, a transmittal sheet is filled out with the reason that the form cannot be processed and is returned to the user department. Some of the reasons that the form could be returned include:

- No general ledger account code exists;
- Insufficient budget;
- Conference or seminar registration not attached;
- No indication of whether registration fees are to be prepaid by mail, paid by employee and reimbursed or paid at the time of conference or seminar through a cash advance;
- Conference or seminar registration form not completed;
- Lack of prior approval for car rental;
- Hotel/housing form not attached;
- Form 905 not properly approved;
- Travel documentation received without receiving a Form 905.

Because of the multiple reviews in the Purchasing Department and the practice of returning incorrect forms even when the problem or question could be resolved through an e-mail or telephone call, the processing time

for the form can be so lengthy that registration deadlines for seminars or conferences can be missed, resulting in employees having to cancel or reschedule planned trips.

Recommendation 84:

Require departmental staff to process travel forms through the CIMS III travel system.

Allowing departments and other users to enter travel requests online just as purchase orders are entered will cut down on processing time and the amount of paperwork handled in the Purchasing Department.

Once the travel information is entered into the CIMS III system, all payment requests can be sent directly to the Accounts Payable Department for processing.

In addition, eliminating excessive reviews and approvals will help to streamline the process. After travel has been completed, an accountant in the Accounting Department can be assigned to review the travel documentation and close out the form.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer develops procedures for decentralizing the entry of travel forms.	June 2001
2.	The chief financial officer meets with the chief information officer to develop decentralized data entry capabilities to the CIMS III system.	July 2001
3.	The chief information officer makes the necessary changes to the system.	August 2001
4.	The chief financial officer recommends eliminating a purchasing clerk position to the superintendent and board.	August 2001
5.	The board approves eliminating the position.	September 2001
6.	The superintendent asks the director of Human Resources to eliminate a purchasing clerk position.	September 2001

FISCAL IMPACT

Two FTEs in the Purchasing Department are responsible for processing approximately 6,300 travel forms annually. By decentralizing the data

entry effort and placing the reconciling function for travel advances in the Accounting Department, the district can eliminate one purchasing clerk.

The fiscal impact of eliminating one purchasing clerk position is calculated to be \$26,446 (\$22,484 base salary + 9.35 percent benefits +\$1,860 fixed health insurance benefits).

Recommendation	2001-2002	2002-03	2003-04	2004-05	2005-06
Require departmental staff to process travel forms through the CIMS III travel system.	\$26,446	\$26,446	\$26,446	\$26,446	\$26,446

FINDING

On May 9, 2000, the FWISD school board voted to accept an inter-local purchasing agreement with the Texas Cooperative Purchasing Network (TCPN). To date, however, the district has not participated in the purchasing cooperative. In fact, when a copy of the inter-local agreement with the TCPN was requested from the district, the purchasing supervisor was not aware that the agreement existed.

TCPN and the Region 4 Education Service Center (ESC) formed an alliance to provide cooperative purchasing opportunities to school districts and other public entities. Participation in the TCPN provides the legally required competition for contracts for commonly purchased items. This provides a savings to the school district by eliminating some aspects of the competitive bid process.

Some of the benefits of TCPN participation include:

- Greater efficiency and economy in acquiring goods and services;
- Innovative purchasing procedures to ensure the most competitive contracts;
- Competitive price solicitation and bulk purchasing for multiple government entities that yields economic benefits that cannot be obtained by individual entities;
- Quick and efficient delivery of goods and services by contracting with "high performance" vendors;
- Equitable purchasing power for smaller entities that cannot command the best contract for themselves;
- Credibility and confidence in business procedures by maintaining open competition for purchases and by complying with purchasing laws and ethical business practices; and
- Assistance in maintaining the essential controls for budget and accounting purposes.

A review of warehouse stock lists indicate that the district is either out of stock or running critically low on many items. Some of these items include the following:

- Handheld calculators;
- Chalk;
- Blackboard erasers;
- Laminating film;
- Glue;
- Handwriting paper for grades one and two;
- Primary pencils;
- Felt;
- Yarn;
- Paintbrushes;
- Paint;
- Crayons; and
- Construction paper.

In November 2000, schools reported they had been waiting on delivery of some supplies since school started in August 2000. Warehouse staff and Purchasing staff said these items had not been bid because of a backlog in the Purchasing Department.

If the Purchasing Department is slow to respond to district users' needs, it runs the risk of users attempting to use alternative methods of procurement to obtain the items they need. This situation could result in violations of district purchasing policies or state purchasing laws.

Many school districts that participate in the TCPN cooperative save both staff time and money. In addition to the TCPN, there are many other procurement options available to help school districts with the procurement function. These include making purchases through the State of Texas General Services Commission (GSC), participating in the Qualified Information System Vendors (QISV) Catalogue Purchasing Program, Department of Information Resources (DIR) program and participating in other ECS regional cooperatives. State law allows school districts to make purchases from contracts already bid on by state agencies such as the GSC. The QISV and DIR are state-operated programs that provide technology equipment and information resources to governments in Texas.

Recommendation 85:

Actively participate in the Texas Cooperative Purchasing Network.

Participation in the TCPN should not altogether eliminate the competitive bidding process in the district, but doing so would help to cut down on the administrative cost of processing bids. In addition, using the purchasing cooperative would be a way for the district to obtain needed instructional and art supplies in a timely manner without having to issue formal bid requests.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer directs the Purchasing/Risk Management director to use the TCPN inter-local agreement and other procurement mechanisms to ensure adequate inventories of items needed for district operations.	June 2001
2.	The Purchasing/Risk Management director notifies all buyers and the purchasing supervisor of the TCPN inter-local agreement.	June 2001
3.	Buyers research the TCPN website to obtain price information on goods.	Ongoing

FISCAL IMPACT

Implementation of this recommendation would result in efficiency savings for the district.

FINDING

FWISD does not use commodity codes to track and monitor classes of items purchased to ensure compliance with state procurement laws. FWISD's Purchasing Department does review purchases to check for the \$25,000 threshold, but this review is performed manually, which relies on each individual buyer's memory of recent items purchased. When a systematic analysis of purchases is not performed, the district runs the risk of violating competitive bidding rules for items valued at \$25,000 or more (or multiple like items with cumulative values of \$25,000 or more purchased within a 12-month period). For example, several individual purchase orders for athletic equipment may not individually amount to \$25,000, but in aggregate, the purchase orders may exceed the \$25,000 threshold.

Standardized commodity codes were developed by the National Institute of Governmental Purchasing (NIGP) to bring efficiency to the automated purchasing program. Based on a 1983 survey on procurement automation, NIGP released the first version of the NIGP codes in 1984.

Recommendation 86:

Establish a commodity code system and monitor purchases to ensure compliance with Texas purchasing laws.

The district should evaluate the capabilities of the CIMS III software purchasing module and determine whether to use its category code fields or to customize the system to use NIGP commodity codes.

When a process has been designed to handle item code tracking, all department and school users should enter the codes for all purchases. The Purchasing Department should distribute a list of codes to schools and departments, with instructions on how to use the coding system. The commodity code can be verified by Purchasing Department staff when purchase orders are approved. Upon verification, the purchasing supervisor and all buyers should review management reports that will aggregate purchases for like items. If like purchases totaling \$25,000 or more are noted, competitive bid procedures should be initiated.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The chief financial officer and the Purchasing/Risk Management director meet with Information Services staff to determine whether to use the CIMS III system's existing category codes or to customize the system to use NIGP commodity codes.	June 2001
2.	Information Services staff make any necessary changes to the system.	June 2001
3.	The purchasing supervisor provides training for all users of the purchasing system on use of the category tracking system.	August 2001
4.	System users begin using the category code tracking mechanism when entering purchase orders through the CIMS III system.	September 2001
5.	The purchasing supervisor and buyers monitor purchase order reports and solicit bids for items before reaching the \$25,000 aggregate amount.	Ongoing

FISCAL IMPACT

This recommendation can be implemented using existing resources.

Chapter 8

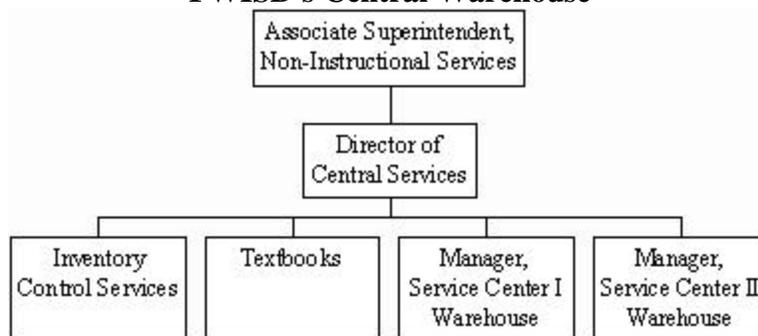
PURCHASING AND WAREHOUSING

B. Warehouse Services

An efficient warehouse operation should ensure all purchases and deliveries to schools and units are complete and timely; inventory levels are sufficient to meet requests for supplies from individual schools and units; property and equipment are accounted for properly and controlled; and surplus or obsolete property is disposed of properly and removed from district records.

All warehouse facilities fall under the direction of the director of Central Services. **Exhibit 8-6** shows the organizational structure of the department.

Exhibit 8-6
Organizational Structure of
FWISD's Central Warehouse



Source: FWISD Central Services Department, November 2000.

The district maintains two main supply warehouses. The central warehouse holds school, janitorial, office and other supplies so schools and departments will have ready access to common items. The central warehouse occupies 40,420 square feet of space in a facility located at 2808 Tillar, just behind the central administration building. A second warehouse facility at 509 East North Side Drive houses all food and cafeteria supply items for the Nutrition Services Department. This warehouse has a total capacity of 27,682 square feet in two separate, but adjoining, buildings. In addition, the district maintains a surplus storage facility. Chapter 11, Nutrition Services and Chapter 6, Asset and Risk Management, respectively, cover these facilities.

The central warehouse space has not been increased since it was constructed in 1967, even though the student population has grown

significantly since that time. Although warehouse space is tight, the department has managed the space well by continually evaluating item usage trends and adjusting optimum inventory levels and the mix of items accordingly. In addition, the warehouse is equipped with movable storage racks so space can be modified to maximize capacity depending upon the items stored.

The central warehouse publishes a catalog twice annually for all schools and departments. The catalog describes all items stocked in the warehouse and includes pricing and stock number information. All schools and departments requisition goods from the central warehouse through the CIMS III inventory module. Users enter requisition information, similarly to entering purchase order information. Once daily, the inventory control manager prints all requisitioned items and schedules the deliveries of the items. Upon filling the orders, the CIMS III system automatically reduces the inventory quantities and charges the items against the requisitioning department's budget.

The central warehouse makes deliveries to each school twice weekly. A copy of the requisition accompanies all goods delivered. To expedite the delivery process, school or department staff members receiving the goods are not required to sign for items. Instead, warehouse policy allows departments or schools three days to report errors in quantity or defective or damaged goods. Any reports of shortages or defects made within the three-day period are corrected and adjustments made to the accounting records. Department and school staff interviewed report few instances of problems with delivery. While there is a risk that items could be inappropriately accounted for, warehouse management believes it is a worthwhile trade-off for efficiency.

In addition to the twice-weekly deliveries to schools and departments, the central warehouse operates a "will-call" service. The will-call service allows schools or departments to come directly to the warehouse to pick up needed items.

The inventory balance at the central warehouse as of November 13, 2000 amounted to \$1,457,874. **Exhibit 8-7** shows the major categories of items stocked in the central warehouse.

Exhibit 8-7
Inventory listing as of November 13, 2000
For FWISD's Central Warehouse

Item	Inventory value at 11/13/00	Percent of Total
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NCS Forms	\$4,653	0.3%
Information Services Supplies	5,962	0.4%
Paint Department Supplies	13,278	0.9%
Computer Parts and Supplies	14,026	1.0%
Physical Education Supplies	14,722	1.0%
Medical Supplies	18,225	1.3%
Executone Telephone and Supplies	23,287	1.6%
Plumbing Supplies	27,416	1.9%
Parts - Rooftop Carrier Heat and A/C Unit	29,969	2.1%
Administrative Offices Reserved Stock Items	31,180	2.1%
Art Supplies	32,142	2.2%
Printed Forms	37,577	2.6%
Instructional Supplies	41,806	2.9%
Reproduction and Printing Supplies	54,080	3.7%
Utility Supplies	67,814	4.7%
Surveillance Equipment	90,529	6.2%
Electrical Supplies	113,072	7.8%
Custodial Supplies	124,673	8.6%
Audio/visual supplies	161,061	11.0%
Office Supplies	252,646	17.3%
Carpet and Drapery Supplies	299,756	20.6%
Total Inventory Value as of 11/13/00	\$1,457,874	100.0%

Source: FWISD stock status listing dated November 13, 2000.

FINDING

The warehouse staff conducts regular inventory counts throughout the year. The schedule in **Exhibit 8-8** shows the schedule of inventory counts by item classification for the current fiscal year.

To conduct each inventory with minimal interruption, the area being counted is closed for a one-week period of time. This allows staff to count all items and conduct recounts if necessary. Notices of area closures are

sent in advance to all user departments, allowing them to ensure they order needed items before inventory counts begin. The schedule presented below is sent to the Accounting Department and the Internal Audit Department so staff in those departments can observe inventory counts.

To conduct the counts, inventory control staff is given inventory listings showing all items, but quantities on hand are deleted. This allows for a "blind" count of the goods on hand. Any discrepancies are investigated to determine reasons for shortages.

After the weekly counts are finished, an adjustment schedule is sent to the Accounting Department so that inventory values can be adjusted in the general ledger. The necessary adjustment, or write-off, is to ensure that book values of inventory reflect warehouse inventory balances. Write-off percentages can also be an indication of how well an organization is safeguarding and accounting for its inventory stock. Generally, an inventory variance of less than 4 percent reflects an effective inventory control system.

Exhibit 8-8
FWISD Inventory Schedule
Fiscal Year 2001

Item Number	Item Description	Inventory Count Date Week Of:
15-0000	Custodial Supplies	11/6/00
60-0000	Utility	11/13/00
20-0000	Instructional	12/13/00
35-0000	Physical Education	3/7/01
40-0000	Medical	3/14/01
07-0000	Office	2/28/01
25-0000	Art	12/13/00
12-0000	Information Services	11/27/00
14-0000	Administration Building Supplies	11/27/00
67-0000	Painting Supplies	11/13/00
81-0000	Government Dry Goods	2/7/01
85-0000	Government Frozen Goods	2/7/01

73-0000	NCS Forms	12/4/00
90-0000	Music Folders	11/27/00
91-0000	Radios	11/27/00
55-0000	Roof-top/ A/C Supplies	1/8/01
30-0000	Electrical Supplies	1/29/01
33-0000	Security/ Audio/Visual Supplies and Equipment	1/22/01
32-0000	Telephone Supplies and Equipment	1/22/01
50-0000	Plumbing Supplies	1/8/01
49-0000	Carpet	1/8/01
09-0000	Reproduction and Printing Supplies	12/4/00
34-0000	Edwards Fire	1/22/01
83-0000	Non-food Supplies and Equipment	4/4/01
82-0000	Purchased Dry Goods	4/4/01
86-0000	Purchased Frozen Goods	4/4/01
11-0000	Forms	2/21/01

Source: FWISD Central Services Warehouse, November 2000.

Exhibit 8-9 shows the annual inventory adjustment percentages made to FWISD's Central Warehouse inventory for the past three years. As the exhibit shows, FWISD variances have been less than 1 percent annually since 1998.

Exhibit 8-9
FWISD's Annual Inventory Adjustments
1998 - 2000

Year	Percent Variance
1998	0.8%
1999	0.3%
2000	0.4%

Source: FWISD Accounting Department, Inventory Adjustment Schedule for the year indicated.

COMMENDATION

WISD holds inventory write-offs to a minimum by adequately safeguarding and accounting for warehouse inventories and conducting regular inventory checks.

FINDING

A review of inventory reports shows FWISD stocks an excessive amount of office supply items. The total value of office supplies as of November 13, 2000 was \$252,646 as shown in **Exhibit 8-10**. The largest subcategories of office supplies are paper goods, file folders, envelopes and pens and pencils. Duplicator paper alone amounted to \$127,008.

Exhibit 8-10
Inventory Values of Office Supplies
As of November 13, 2000

Item	Value	Percent of Total
Index Cards	\$1,307	0.5%
Computer Diskettes	7,733	3.1%
Envelops	11,056	4.4%
File Folders	11,933	4.7%
Legal Pads	867	0.3%
Post-it Notes	1,536	0.6%
Cover Paper	24,592	9.7%
Duplicator Paper	127,008	50.3%
Pens/Pencils	10,580	4.2%
Printer Ribbons	4,797	1.9%
Staplers and Staple Supplies	5,885	2.3%
Tape	7,781	3.1%
Miscellaneous	37,571	14.9%
Total	\$252,646	100.0%

Source: Central Warehouse inventory reports dated November 13, 2000.

During fiscal 2000, the district established a contract with a local office supply vendor to provide office supplies at a discounted catalog rate on a

just-in-time basis. In interviews with departmental and school staff, all employees interviewed spoke favorably about the contractual arrangement, saying that in most cases their orders are delivered the next business day.

Recommendation 87:

Reduce the amount of office supplies stored in the Central Warehouse and maximize use of the just-in-time contract for supplies.

Implementing this recommendation will free up valuable warehouse space in addition to saving the district time and money.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Central Services directs the inventory control supervisor to reduce the office supply inventory levels.	June 2001
2.	The director of Central Services develops a plan for the use of the space made available by reducing the supply inventory.	August 2001

FISCAL IMPACT

This recommendation can be implemented using existing resources.

FINDING

The district does not regularly schedule warehouse and delivery vehicles for replacement. **Exhibit 8-11** shows the vehicle inventory for the warehouse.

**Exhibit 8-11
Vehicle Inventory in
FWISD's Central Warehouse**

Year	Make/Model	Mileage
1979	Chevrolet cargo van - 3/4 ton	96,383
1980	Chevrolet cargo van - 3/4 ton	134,030
1980	Chevrolet cargo van - 3/4 ton	154,660
1984	Chevrolet S-10 pickup truck - 1/2 ton	71,090
1987	Chevrolet pickup - 3/4 ton	57,120
1989	Chevrolet step van - 1 ton	126,865

1991	Chevrolet step van - 1 ton	101,951
1992	Chevrolet step van - 1 ton	99,590

Source: FWISD's Central Warehouse, November 2000.

As **Exhibit 8-11** shows, 75 percent of the vehicle inventory is more than 11 years old. Studies show that older vehicles are more costly to maintain because the cost of parts and labor increase as the vehicle ages. In addition to the vehicles listed in the exhibit, the department purchased a new cargo box van with a hydraulic lift system for textbook deliveries in November 2000. This vehicle, however, is an addition to the warehouse fleet, not a replacement. This purchase was funded through budget savings.

The district's Vehicle Maintenance Department maintains all delivery vehicles. Vehicle Maintenance performs routine maintenance on all the vehicles on a regular basis.

Recommendation 88:

Prepare a vehicle replacement schedule and budget for regular vehicle replacement.

Districts that replace old vehicles in a timely manner have lower maintenance costs and higher salvage values. To ensure the warehouse can maintain scheduled deliveries uninterrupted, and to ensure driver safety, a vehicle replacement schedule should be developed and funds should be budgeted annually for replacements.

Replacement schedules vary depending upon the type of vehicle required for service and its intended use. The director of Central Services should develop a replacement schedule, and budget funds each year for future vehicle replacements. The department should replace the oldest two vehicles in the fleet inventory for the next two years. After this, funds should be budgeted to replace one vehicle each year.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Central Services requests funding to replace two vehicles.	June 2001
2.	The superintendent approves the funding.	July 2001
3.	The director of Central Services develops a replacement schedule for all vehicles based on vehicle type and intended use.	July 2001

4.	The director of Central Services budgets for two new vehicles for each of the next two years.	August 2001 and August 2002
5.	The director of Central Services begins budgeting for a vehicle replacement each year.	August 2003

FISCAL IMPACT

The cost of vehicle replacement will vary depending upon the particular vehicle and any special equipment needed for it. The average cost for a 2001-model, one-ton cargo van with a V-8 engine is \$21,900. However, an average cost of \$25,000 per vehicle is used to estimate this fiscal impact to allow for any special equipment or fittings required.

To replace two vehicles annually for the next two years will result in an annual cost of approximately \$50,000 for fiscals 2002 and 2003. Beginning in fiscal 2004, the Central Services Department should begin funding for one vehicle replacement each year.

Recommendation	2001-2002	2002-03	2003-04	2004-05	2005-06
Prepare a vehicle replacement schedule and budget for regular vehicle replacement.	(\$50,000)	(\$50,000)	(\$25,000)	(\$25,000)	(\$25,000)

Chapter 8

PURCHASING AND WAREHOUSING

C. Textbooks

Chapter 31 of the Texas Education Code (TEC) spells out the rules and regulations surrounding state textbooks. Section 31.001 of the code states "textbooks selected for use in public schools shall be furnished without cost to the students attending those schools."

The Textbook Administration Division of the Texas Education Agency (TEA) is responsible for coordinating the review, adoption, purchase and distribution of textbooks and other instructional materials for all Texas public schools and open-enrollment charter schools. After adopting suggested textbooks each year, TEA produces a recommended text list that is distributed to all Texas school districts.

TEA then loans books upon request to school districts. The TEA calculates the number of books allowed to each school district based on enrollment data by subject and grade. Districts submit enrollment data to TEA through the Public Education Information Management System (PEIMS) reporting system. TEA spends approximately \$200 million on textbooks and instructional materials annually.

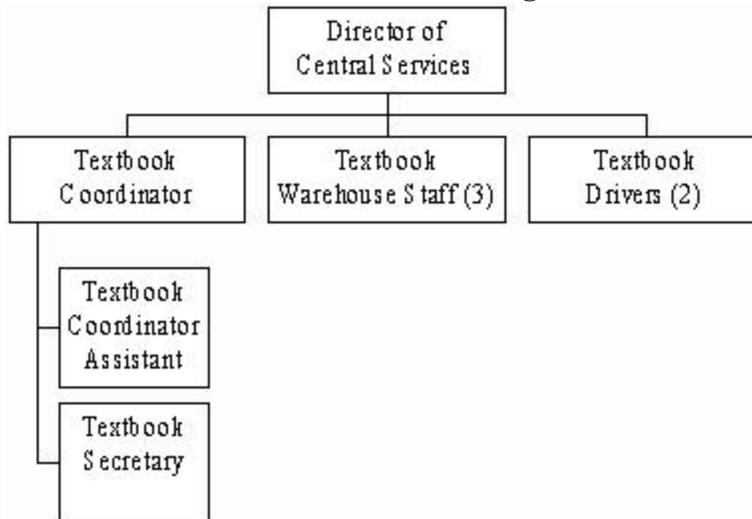
FWISD maintains a textbook selection committee made up of instructional administrators, principals and teachers. The committee is responsible for considering the recommended textbook list from TEA, reviewing other texts available and developing an adopted textbook list for the district. School districts are responsible for accounting for all textbooks, and lost or damaged books are the responsibility of the district. The district may collect for lost or damaged books from the students or the students' parents under certain circumstances prescribed by law. Districts cannot obtain additional textbooks from TEA until the price of the missing textbooks have been reimbursed to the agency.

In addition to the textbook selection committee, the district has a textbook coordinator who is responsible for all textbook ordering and inventory reporting to TEA. The coordinator is also charged with ensuring that all books are received and processed, and that all schools receive textbooks and also for identifying and returning any textbook surpluses to TEA.

Exhibit 8-12 shows the organizational structure of the textbook function in the district. The only positions devoted to textbook operations on a full-time basis are the textbook coordinator and a textbook coordinator assistant. The position of textbook secretary was intended to be a full-time

position, but this position also handles Central Warehouse receiving. Only 20 to 25 percent of this position's time is devoted to textbooks. Other staff members are used only when needed.

Exhibit 8-12
FWISD's Textbook Coordinating Functions



Source: FWISD's Central Services Division, November 2000.

Surplus textbooks are stored in the Central Warehouse, but due to space limitations, all issued books must be stored at each individual school when not issued to a student. Upon receiving new textbook shipments, Textbook Department staff receive and process the books in the Central Warehouse and then deliver them to school locations.

The district uses a bar coding tracking system called the Hayes Software System to account for and track books. The Hayes Corporation has coordinated with the TEA so all TEA recommended textbooks are automatically entered into the software, saving districts from having to enter all textbook titles.

All schools manually submit book orders to the textbook coordinator. The coordinator inputs quantities ordered into the Hayes system, which is transmitted to TEA. The Information Services Department is working with the Hayes Corporation to hook-up all schools so orders can be input directly from each school site. The district completed a pilot of the Hayes system in all high schools and will be implementing the system districtwide.

The district participates in the North Texas Textbook Coordinators' Association (NTTCA) and the Textbook Coordinators Association of Texas (TCAT). These organizations provide training and certification for

textbook coordinators and provide a forum for sharing ideas and developing solutions to problems in receiving, accounting for, and managing the textbook functions in school districts.

FINDING

The district does not enforce requirements for schools to pay for missing textbooks. As a result, the district is either short on certain titles or pays to replace missing books. **Exhibit 8-13** shows the value of missing books for the past two fiscal years. As shown in the exhibit, textbook losses in fiscal years 1999 and 2000 amounted to \$1,213,267 and \$650,583, respectively. Although the district's losses were reduced by 46 percent from fiscal year 1999 to 2000, the annual losses continue to be excessive. As the exhibit shows, some individual schools have annual losses of close to \$60,000.

Exhibit 8-13
FWISD's Lost Textbooks by School
Fiscal Years 1999 and 2000

Location Number	School Name	Value of Missing Textbooks Fiscal Year 1999	Value of Missing Textbooks Fiscal Year 2000
Elementary Schools:			
63	Como Montessori	\$37,384	\$1,735
101	A/C Applied Learning Center	2,249	0
103	Benbrook Elementary	3,461	49
105	West Handley Elementary	12,630	82
107	Burton Hill Elementary	2,443	140
110	Carroll Peak Elementary	36,643	1,878
111	Carter Park Elementary	30,641	3,629
114	Manual Jara Elementary	45,285	0
115	George C. Clarke Elementary	25,536	0

116	Lily B. Clayton Elementary	19,466	0
117	Como Elementary	5,092	898
119	E. M. Daggett Elementary	48,033	0
120	Rufino Mendoza Sr. Elementary	18,661	1,281
121	De Zavala Elementary	21,881	0
122	Diamond Hill Elementary	5,393	0
123	SS Dillow Elementary	26,401	0
124	Maude I. Logan Elementary	3,674	0
125	Eastern Hills Elementary	24,729	0
126	East Handley Elementary	50	120
127	Eastland Elementary	16,740	0
130	Harlean Elementary	510	60
132	Glen Park Elementary	21,512	0
133	William Green Elementary	23,520	0
134	Greenbriar Elementary	4,840	0
135	Van Zandt-Guinn Elementary	140	0
137	Hubbard Elementary	5,241	0
138	H.V. Helbing Elementary	5,033	7,716
139	Milton L. Kirkpatrick Elementary	12,457	550

141	Meadowbrook Elementary	12,161	0
143	D. McRae Elementary	21,875	3,636
144	Mitchell Boulevard Elementary	19,151	0
146	M. H. Moore Elementary	9,147	75
147	Morningside Elementary	18,320	0
148	Charles E. Nash Elementary	5,394	0
149	North Hi Mount Elementary	14,965	1,784
150	Oakhurst Elementary	41,214	5,565
151	Nathan Howell Elementary	5,086	7,033
152	Oaklawn Elementary	10,989	0
153	A. M. Pate Elementary	29,774	0
154	Mary Louise Phillips Elementary	\$18,351	\$755
156	Ridglea Hills Elementary	3,437	1,700
157	Luella Merrett Elementary	10,090	0
159	Versia L. Williams Elementary	6,823	0
160	Maudrie M. Walton Elementary	6,157	0
161	Sam Rosen Elementary	17,648	0
162	Sagamore Hill Elementary	43,414	3,596

163	Burce Shulkey Elementary	5,781	645
165	Richard J. Wilson Elementary	33,720	0
166	South Hi Mount Elementary	20,121	754
167	South Hills Elementary	4,580	70
168	Springdale Elementary	1,555	1,650
169	Sunrise Elementary	14,029	0
171	Tanglewood Elementary	116	0
172	W. J. Turner Elementary	22,597	1,824
175	Washington Heights Elementary	9,341	30
176	Waverly Park Elementary	N/A	0
177	Westcliff Elementary	3,734	0
178	Westcreek Elementary	2,543	0
180	Western Hills Elementary	3,141	0
184	Worth Heights Elementary	10,178	455
186	David K. Sellars Elementary	14,879	0
187	J. T. Stevens Elementary	5,489	0
188	Atwood McDonald Elementary	14,311	6,695
190	Riverside Applied Learning Center	33,028	0
206	Bill Elliott	26,901	0

	Elementary		
207	Westpark Elementary	2,132	0
208	T. A. Sims Elementary	33,015	435
209	Edward J. Briscoe Elementary	34,213	325
216	Woodway Elementary	15,338	0
217	I. M. Terrell	0	0
Total missing textbooks for elementary schools		\$1,064,383	\$55,165
Middle Schools:			
18	Middle Level Learning Center	\$0	\$0
41	Horizons Alternative School	0	527
42	Daggett Middle	0	23,258
43	Wedgwood 6th Grade School	0	2,288
44	Elder Middle	2,561	3,584
45	Forest Oak Middle	72,289	31,762
46	vv Dunbar 6th Grade	2,994	6,385
47	Handley Middle	0	9,070
48	William James Middle	945	43,222
49	Kirkpatrick Middle	1,146	833
50	McLean Middle	0	3,484
51	Meacham Middle	0	2,414
52	Meadowbrook Middle	0	59,264
53	Monnig Middle	0	22,664
54	Morningside Middle	10,254	10,723

55	Applied Learning Academy	232	1,002
56	Riverside Middle	1,442	8,920
57	Rosemont Middle	0	49,314
58	Stripling Middle	0	43,541
59	Dunbar Middle	0	19,497
60	Wedgwood Middle	0	659
61	Leonard Middle	0	6,482
62	International Newcomer Academy	0	0
64	Glencrest Middle	1,347	1,182
67	Rosemont 6th Grade	N/A	0
Total missing textbooks for middle schools		\$93,210	\$350,075
High Schools:			
1	Amon Carter-Riverside High	\$373	\$638
2	Arlington Heights High	0	0
3	South Hills High	0	0
4	Diamond Hill-Jarvis High	9,127	8,552
5	Dunbar High	3,170	10,057
6	Eastern Hills High	0	0
8	North Side High	30,184	33,831
9	Polytechnic High	0	41,090
10	Paschal High	0	75,393
11	Trimble Technical High	11,655	18,376
14	Southwest High	0	6,251
15	Western Hills High	0	847
16	O. D. Wyatt High	1,165	37,465

17	New Lives School	0	6,083
19	Metro Opportunity High	0	41
21	Success High School	0	4,652
230	Accelerated High	N/A	2,067
Total missing textbooks for high schools		\$55,674	\$245,343
Districtwide total missing textbooks		\$1,213,267	\$650,583

Source: FWISD's Textbook Department, December 2000.

District policy requires all textbook custodians, usually the assistant principal, at each school conduct an annual inventory of textbooks and reimburse the district for any missing textbooks. State law allows districts to collect from students for missing textbooks, but this is not enforced in the district.

School districts that hold schools responsible for accounting for textbooks and reimbursements out of school funds have fewer annual losses. Some districts require principals to pay for missing textbooks from the principal's activity funds, which are funds held at the school level and outside of general funds. The incentive to account for books and the level of accountability are then placed at the appropriate level.

Recommendation 89:

Enforce district policy to require schools to reimburse the district for missing textbooks.

Enforcing district policy requiring schools to reimburse the district for missing textbooks out of school funds or principal activity funds will provide incentive to assistant principals to attempt to collect from students for missing books. In addition, such policies provide an incentive to both principals and teachers to conduct routine textbook counts so that losses can be identified in a timely manner.

Principals should ensure that strict enforcement of textbook policy and procedures are considered in teacher evaluations to improve the student collection rate for lost textbooks.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The superintendent issues a memo to all schools stating that textbook reimbursement policies will be enforced.	June 2001
2.	The director of Central Services directs the textbook coordinator to document all outstanding reimbursements by school.	June 2001
3.	The director of Central Services directs the textbook coordinator to notify each assistant principal of reimbursements due.	June 2001
4.	The director of Central Services directs the textbook coordinator to develop a list of schools that fail to pay for missing textbooks.	July 2001
5.	The superintendent reviews the list of schools that have failed to pay for missing textbooks and meets individually with each assistant principal.	September 2001
6.	The director of Central Services directs the textbook coordinator to monitor textbook reimbursements and make a report to the superintendent.	Ongoing

FISCAL IMPACT

Enforcing district policy will provide incentive to textbook administrators in the schools to collect reimbursement for missing books from students. If missing textbooks can be reduced by 20 percent, the district would be able to save approximately \$130,117 annually (\$650,583 textbook losses for fiscal 2001 x 20 percent), since the principal activity funds come from sources other than the district's general fund.

Recommendation	2001-2002	2002-03	2003-04	2004-05	2005-06
Enforce district policy to require schools to reimburse the district for missing textbooks.	\$130,117	\$130,117	\$130,117	\$130,117	\$130,117

Chapter 9

COMPUTERS AND TECHNOLOGY

This chapter reviews technology management in the Fort Worth Independent School District (FWISD) in four sections:

- A. Management and Operations
- B. Technology Planning
- C. Instructional Technology
- D. Technology Infrastructure and Hardware

The responsibilities of Texas school districts' management information services (MIS) units vary. Some support only administrative functions, while others, such as San Antonio Independent School District's (SAISD), support both administrative and instructional technology. Administrative technology includes computer systems that affect the operation the school district-chiefly financial, personnel, payroll, student attendance, grade and Public Education Information Management System (PEIMS) reporting. Instructional technology involves the use of technology in the classroom as an integral part of the teaching process.

Generally, MIS offices are responsible for a district's entire information technology infrastructure, including the implementation, support and administration of a wide area network (WAN), support for local area networks (LAN) in schools and administrative offices and in some cases the district's telephone system. MIS units that also support instruction usually administer a district's state technology allotment funds. In addition, MIS offices often assist in the development of grant applications for technology projects and provide technology-related staff training.

Chapter 9

COMPUTERS AND TECHNOLOGY

A. Management and Operations

A superior technology support department must be familiar with school operations, technology used for instructional purposes and technology-related training, particularly training that integrates new technologies into the curriculum. The department should work closely with the curriculum and instruction department to ensure its initiatives support learning programs.

A well-managed administrative technology and information services department is guided by a clearly defined mission plan based on appropriate goals and organization, well-defined development procedures for new applications and a customer-service orientation that anticipates and meets user needs.

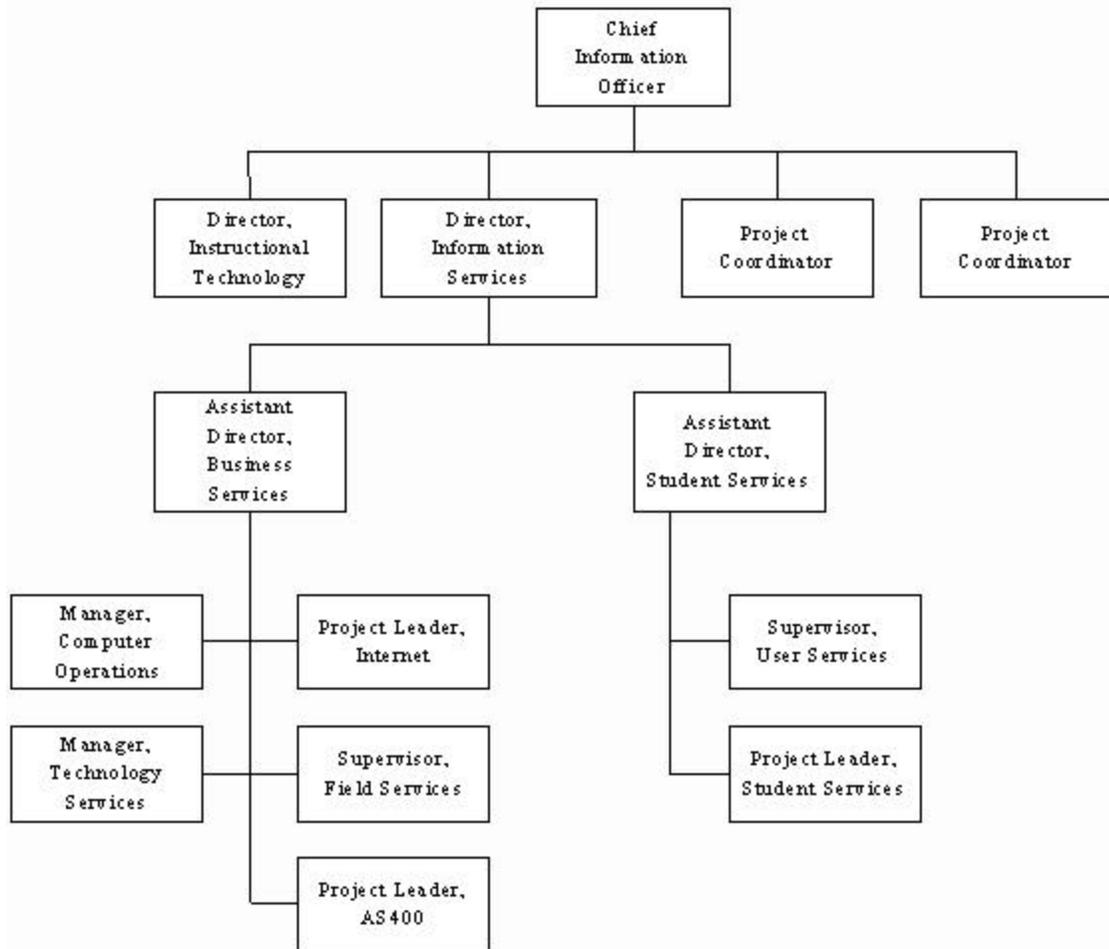
FWISD's technology department was reorganized based on recommendations made in a 1998 study by accounting, tax and consultant firm Deloitte & Touche. The district contracted for the study to assess the state of technology in the district and to develop a strategic technology plan. Recommendations were made for improving application architecture, professional development, technology strategy and information services resource management. Key stakeholders, including teachers, administrators, students and community members were involved in the development of the technology plan.

The study recommended creating a chief information officer position and a realignment of the director of Instructional Technology under the chief information officer. These positions were established and filled in 1998, consolidating instructional and administrative technology under Information Technology Services (ITS). **Exhibit 9-1** presents FWISD's organization structure for technology.

Exhibit 9-1

FWISD Information Technology Services Organization Chart

1999-2000



Source: FWISD organization chart - Information Technology Services.

The instructional technology group is responsible for the use of technology in the classroom, supporting classroom hardware and software and training teachers and classroom staff. The administrative services group is responsible for the support, maintenance and development of business technology within the district. The group is under the guidance of the director of Information Services, a vacant position.

ITS has 72 budgeted positions, with eight vacancies and no requests for additional staff pending. Independent consultants are used for network design and maintenance. And an independent project manager supervises the installation of network wiring and electronics at 53 schools that qualify for the federal Universal Service Fund for Schools and Libraries (E-Rate), which provides discounts to schools on telecommunications services. Discounts range from 20 percent to 90 percent, and are based on the number of students eligible for the federal school lunch program.

The district pays the Regional Education Service Center \$1.75 per student for discounted technology services. These services include:

- Free school placement of licensed videos for teachers to use in the classroom;
- Free online resources such as Logal.net and electronic encyclopedias;
- Previously placed instructional CD-ROM sets;
- Free, regionally licensed distance learning and teleconferences;
- Discounted pricing on duplication of non-licensed videotapes such as tapes made available through the Texas Education Agency, T-Star and other videotape providers;
- Discounted staff development workshops;
- The discounted technology campus mentor development program;
- Free technical assistance;
- Discounted online resources;
- Discounted satellite dish maintenance contracts;
- Discounted direct connect Internet access;
- Discounted Internet filtering services;
- Discounted technology library institutes and academies; and
- Free technology planning assistance.

The ITS Department dedicates resources to keeping its staff trained on current technologies. **Exhibit 9-2** presents ITS staff training programs for 2000-01.

Exhibit 9-2
Technology Staff Professional Development
2000-01

Description of Training	Attendees
Adobe Photoshop; JAVA; HTML	Web team
Cisco Routers	Network administrators; manager of Technical Services
Citrix	Systems analyst for Web team
Intermediate and Advanced MS Word	All ITS Staff
KRONOS; CIMS III	Financial systems support staff
Microsoft Access	Programmers; assistant directors
Microsoft Project/PowerPoint	Lead staff
NT 4.0	Field support staff; network administrators

SASI Certification;	Assistant director; help desk
SASIXp District Integration (DI)	Systems analyst for web team; lead student services programmer; manager of Technical Services
SASIXp Training; Integrate Pro; TSSI; Purchase Orders; Warehouse	All help desk staff
SQL	Network Administrators; Project Leaders; Programmers

Source: ITS Training Summary, November 28, 2000.

In 2000-01, the ITS Department allocated 5 percent of its operating expenditures, or about \$175,000 a year, for technology training and staff development.

FINDING

At the beginning of the 2000-01 school year, FWISD adjusted the salary levels for technology positions to be competitive with other technology employers in greater Fort Worth. The district contracted with the Texas Association of School Boards to conduct a salary survey of technology positions. This survey resulted in the revision of the salary structure and improved FWISD's ability to fill technology positions. The increase in pay levels is also expected to reduce turnover, which has been high in recent years.

Exhibit 9-3 presents a comparative analysis of FWISD's new salary structure compared to Austin ISD (AISD), one of FWISD's peer districts and another city with highly competitive technology wages. On average, FWISD pays more for technology staff than AISD.

Exhibit 9-3 ITS Salary Structure and Comparison 2000-2001

Position	District	Average Actual Salary	Difference
Chief Information Officer	AISD	\$92,397	\$5,715
	FWISD	\$98,112	
Director of Information Services	AISD	\$77,703	\$8,114
	FWISD	\$85,817	
User Support Technician	AISD	\$36,060	\$1,140

	FWISD	\$37,200	
Field Support Technician	AISD	\$34,700	\$11,428
	FWISD	\$46,128	
Computer Operator	AISD	\$32,738	(\$2,738)
	FWISD	\$30,000	
Senior Programmer/Analyst	AISD	\$54,765	\$2,434
	FWISD	\$57,199	
Senior Systems Analyst	AISD	\$63,330	\$3,388
	FWISD	\$66,718	

Source: FWISD Salary Schedule 2000-2001; AISD.

COMMENDATION

FWISD's adjustment of technology salaries has helped fill vacant positions in a timely manner and should reduce turnover.

FINDING

In November 2000, FWISD entered into an agreement with Dell Computer Corporation to provide repair and replacement services for new computers. This agreement provides a maximum of 48 hours for repair or replacement of any new equipment during the first three years following purchase. Dell offered this service without additional cost to its pre-existing hardware bid in an effort to keep FWISD's business.

Prior to this agreement, it typically took two to three weeks for hardware maintenance and repair. Under the agreement, a technician will be on-site the following business day if the call is made before 5:00 p.m. If the problem is not fixed the following day, the technician returns the following day. If the problem cannot be rectified within 48 hours, Dell provides a replacement computer. About 2,000 computers are covered under this agreement. This number grows after each purchase of a new Dell computer.

Because the agreement allows campus technology coordinators to contact Dell directly for support, the ITS Department no longer has to handle these problems. This will increase reliability for the classroom computing and allow field service technicians to devote their time to the backlog of non-warranty work orders.

Since the district signed the agreement in November 2000, management has not been able to report improvement in response times or actual savings. There are plans to measure these by the end of the 2000-01 school year.

COMMENDATION

The district has entered into a maintenance agreement that will improve the IT staff's efficiency and productivity.

FINDING

FWISD does not have adequate resources dedicated to technology support. **Exhibit 9-4** presents the FWISD technology operating expenditures for 1996-97 through 1998-99, including ITS department expenditures and other department and school technology expenditures.

**Exhibit 9-4
Technology Expenditures
1997-99**

Object Description	1996-97	1997-98	1998-99
Salaries for Professional Staff	\$902,533	\$945,559	\$972,100
Extra Duty Pay - Support	\$9,509	\$11,096	\$24,663
Salaries - Support Personnel	\$482,777	\$485,361	\$830,808
Employee Allowances	\$5,307	\$6,360	\$9,792
Social Security/Medicare	\$12,054	\$13,100	\$14,525
Health & Life Insurance	\$35,838	\$41,634	\$47,067
Workers' Compensation	\$24,541	\$20,164	\$25,949
Teacher Retirement System	\$74,801	\$ 86,559	\$83,990
Unemployment Compensation	\$2,072	\$2,156	\$2,743
Teacher Retirement/TRS Care	\$1,305	\$118	\$53
Other Employee Benefits	\$18,195	\$13,093	\$5,833
Consulting Services	\$127,816	\$653,074	\$543,359
Equipment Maintenance and Repair	\$253,764	\$189,262	\$198,566
Rentals - Operating Leases	\$11,234	\$27,747	\$45,577
Contracted Services	\$26,892	\$38,709	\$322,243

Vehicle Fuel	\$690	\$134	\$154
Other Supplies/Maintenance	\$731	(\$64)	\$108
General Supplies	\$224,889	\$284,187	\$287,452
Travel - Employee Only	\$21,256	\$27,493	\$32,830
Property Insurance	\$0	\$0	\$8,436
Fees and Dues	\$14,963	\$632	\$15,843
Total Operating Expenditures	\$2,253,066	\$2,846,374	\$3,472,091
Building Improvements	\$0	\$8,239	\$571,158
Software	\$105,191	\$407,779	\$4,085
Technology Equipment	\$0	\$1,980,702	\$194,304
Total Expenditures	\$2,356,358	\$5,243,094	\$4,241,638

Source: PEIMS financial data files, function 53 - data processing, all funds, 1996-97 through 1998-99.

FWISD allocates fewer resources per student for technology than all of its peer districts. The district's per student expenditures for technology in 1998-99 were \$54.41 (**Exhibit 9-5**). FWISD's peer districts ranged from a low of \$68.38 in El Paso ISD to a high of \$162.22 in Dallas ISD.

Exhibit 9-5
FWISD's Data Processing Expenditures
As Compared to Peer Districts
1998-99

	Fort Worth	Dallas	El Paso	Houston	Austin
Total Expenditures	\$4,241,638	\$25,940,195	\$4,304,442	\$18,101,464	\$5,735,218
Enrollment	77,956	159,908	62,945	210,179	79,496
Per Student	\$54.41	\$162.22	\$68.38	\$86.12	\$72.14

Source: Texas Education Agency, PEIMS, 1998-99.

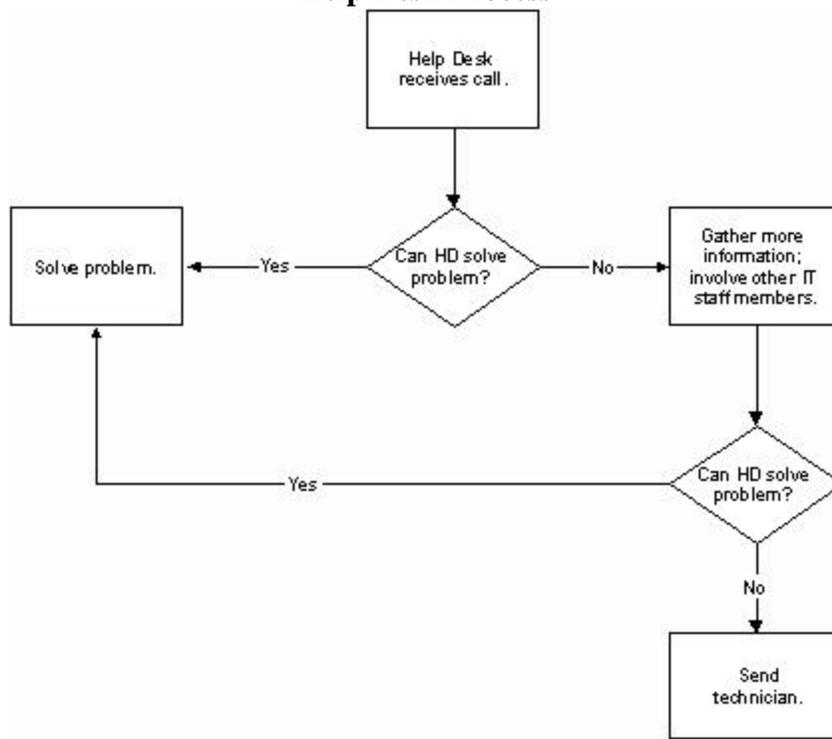
There are three major areas where technology support is provided in the district. The Field Services unit provides technical support primarily related to hardware; the User Services unit represents the district's

technology help desk, through which all software and hardware requests are routed and some addressed directly; and technology coordinators and teacher technologists provide training and minor technical support at the schools. At many schools the technology coordinator and the teacher technologist are the same individual. The Field Services unit and the User Services unit represent 31 of the 72 positions in the ITS Department.

The district's help desk provides software support to district staff. The 12 user support technicians on the help desk support the district's 141 campuses. These technicians field calls for software support and requests for reports using HEAT, a work order tracking system. If a call requires a field support worker visit the location, a work order is created in the work order system.

Between September 1999 and October 2000, the help desk responded to 76,724 calls, or about 533 calls per technician per month. Most of the calls came during August, September and October 2000, when technicians were installing the district's SASIxp software, which is used to track student information. About 90 percent of the calls received are resolved by the technician answering the call. The remainder require additional research or another ITS staff member (typically field service) to help resolve the issue. This process is diagrammed in **Exhibit 9-6**.

Exhibit 9-6
Help Desk Process



Source: Interviews with FWISD IT staff.

A significant number of help desk staff inquiries relate to questions about administrative software and report production. The help desk can answer the administrative software questions, but does not develop documentation or training. In addition, help desk staff spend a significant amount of time following up on production jobs. This activity is time-consuming and keeps them from performing their primary task-answering the phones.

In 1998 the district conducted a survey of teachers that included questions on technical support. Less than 21 percent of the respondents reported that technical assistance from Information Services was helpful in solving their problems, and less than 14 percent believed support improved from the prior year (**Exhibit 9-7**).

Exhibit 9-7
FWISD 2000 District School Effectiveness Teacher Survey:
Technology Support Questions

	Elementary School Percent Agree	Middle School Percent Agree	High School Percent Agree
Information Services is helpful in solving computer-related problems.	16.7%	20.7%	19%
Compared to last year, the support I received from Information Services has improved.	10.2%	13.8%	12.4%

Source: FWISD Research and Evaluation-Survey Results for Elementary, Middle, and High Schools, July 2000.

The Center for Educational Leadership and Technology suggests a range of 100 to 200 computers per technical support staff. FWISD's ratio of computers to technical support staff, including help desk technicians and field service technicians, is 608 to 1 (**Exhibit 9-8**).

Exhibit 9-8
Comparison of Technology Support Ratios to Industry Standard

Description	FWISD
Number of technical support personnel	13

Number of user services personnel	12
Total support	25
Total ITS staff	72
Total number of computers	15,199
Ratio of computers to support staff	608 to 1
Ratio of computers to total ITS staff	211 to 1
Industry standard ratio of computers to support staff	100 to 1 to 200 to 1

Source: FWISD computer inventory, 2000; FWISD ITS Department organizational chart; Center for Educational Leadership and Technology.

The technology coordinators answer some help desk calls and provide minor technical support, but are not trained technicians. The technology coordinator is a teacher who assumes, along with normal teacher duties, the responsibility of campus coordinator for technology issues. This position is the first line of support for hardware and software issues before ITS is contacted. Technology coordinators also install new software releases and perform on-site training for new applications. Other responsibilities include:

- Prepare the school technology inventory when requested (hardware, software and/or training);
- Coordinate requests for maintenance of technology equipment used for instruction;
- Assist the principal and school technology committee in the development of the campus technology plan/proposals;
- Actively support copyright compliance;
- Chair the school Technology Committee that evaluates, selects and orders technology-related supplies, equipment and instructional materials for the school;
- Facilitate communication between campus technology users and Instructional Technology department; and
- Act as a technology resource (an example would be assisting a teacher with equipment for a classroom presentation).

Technology coordinators receive an annual stipend of \$500 for assuming these responsibilities, however, their primary responsibility is teaching. As a result of this dual role, technology problems often go unresolved or unreported to ITS for weeks, and in some cases, months.

Recommendation 90:

Increase ITS support staff by five positions.

Based on the use of technology coordinators and the Dell service agreement, which will support an increasing number of the district's computers, FWISD should not establish the industry average as their target. However, staffing levels are not adequate to support the number of computers in the district and meet user expectations. FWISD should increase its technical support staff technical staff by five positions, allocating staff to field services or user services based need. This will lower the ratio of computers to technical support and improve the quality and timeliness of technical support.

The district should monitor the computer-to-staff ratios, excluding computers covered by the Dell maintenance agreement. This ratio should be compared to historical trends to determine if customer service improves.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Information Services determines the number of positions, by type, to be added to technical support over the next two years and incorporates positions into the ITS Department budget.	June 2001
2.	The director of Information Services requests the Human Resources department post openings for field services and user services technicians.	July 2001
3.	The director of Information Services hires and begins training additional staff.	August 2001
4.	The director of Information Services assigns computer coverage targets for each field service technician and monitors the ratio of computers to field services staff.	September 2001
5.	The director of Information Services monitors the quality and timeliness of services provided by field services and user services technicians through periodic user surveys.	December 2001
6.	On a quarterly basis, the director of Information Services evaluates staffing levels compared to service quality and the level of support provided through the Dell maintenance agreement.	December 2001, and quarterly thereafter

FISCAL IMPACT

As shown in **Exhibit 9-3**, a field service technician makes \$46,128 per year and a user support technician makes \$37,200 per year. Applying benefits of \$1,860 plus 9.35 percent of salary, the cost per field service position is \$52,300 and the cost per user support position is \$42,538. The combined total cost of three field service technicians and two user support technicians is \$241,976 (3 x \$52,300 plus 2 x \$42,538).

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Increase ITS support staff by five positions.	(\$241,976)	(\$241,976)	(\$241,976)	(\$241,976)	(\$241,976)

FINDING

Not all information technology work orders are tracked in the ITS Department work order system. While the help desk enters all calls into the system, it is common for a field technician, while on site, to perform multiple tasks that may or may not be reflected on the original work order.

Between September 1, 1999 and November 28, 2000, the field services technicians received 6,260 work orders of which 5,949 or 95 percent were completed or cancelled. Based on 13 available field technicians this is an average of 457 completed work orders per technician, or 30.5 per month. Because of this extra effort to serve customers, estimates related to the time required to complete a work order or the number of problems fixed are not accurate.

While the Field Services Department estimates the turnaround time for network workstation work orders at two to three days for office computers and three to four weeks for classroom problems, there is no data to support these estimates.

Better serving the customer is the right goal for these field service technicians, and as long as they are at a campus, they should fix whatever they can. However, by not tracking each of these problems, it is impossible for ITS management to use HEAT to identify trends or common problems that they might be able to address and prevent.

Recommendation 91:

Track all technology work orders and response times to improve department efficiency and effectiveness.

The ITS Department should implement procedures to ensure all work requested and performed by ITS staff is recorded as a work order. This

will allow the department to better determine its resource needs and manage its backlog of work. Work order response times should be tracked by technician and by type of request so that the department can measure performance and increase customer satisfaction.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Information Services develops procedures to record all ITS technical support work as a work order.	July 2001
2.	The director of Information Services tracks and analyzes work order response times.	August 2001
3.	The chief information officer reviews historical response times and develops annual target response times for the next five years.	October 2001
4.	The director of Information Services compares actual response times to established targets, evaluates causes for variances and takes corrective action.	May 2002 and each month thereafter

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 9

COMPUTERS AND TECHNOLOGY

B. Technology Planning

The Texas Education Code, Section 11.252, 3 (D), requires each school district improvement plan to include provisions for integrating technology into instructional and administrative programs. Some districts compile these plans with few of the elements required to guide a district's efforts to use and improve its technology effectively. For example, technology plans normally contain goals and strategies for instructional technology but contain little about the effective use of technology to automate or streamline administration. Improved automation and integration of administrative functions can streamline operations and eliminate the excessive paper shuffling that drains district resources from the classroom.

The best plans contain clear goals, objectives and action plans for technology projects. They assign individual responsibility for implementation steps and identify milestone dates for completion.

Planning for the use of new technologies is particularly important to education because factors listed below.

Equity: Despite the best intentions, the level of technological resources available to each school in a district can vary. Unfortunately, poorly planned introductions of new technology can widen the gap between the "haves" and "have nots." Careful planning at the district level can ensure that all schools receive adequate, appropriate and consistent support; at the school level, it helps to guarantee that no child is excluded from the benefits of new technology.

Rapid Change: The pace of technological change continues to accelerate. If planning for the implementation of new technology does not allow for an adequate period of time (such as three to five years), the district risks failing to take full advantage of this rapid change.

Funding: Funding can be the greatest barrier to using technology effectively in the classroom. Unless planning addresses whether and how projects will be funded, limited funding can have a greater impact than it should.

Credibility: The public is anxious to see its tax dollars are well spent. Thorough planning makes it possible to demonstrate that proposed strategies have been well thought out, acquisitions of technological

resources have been carefully considered and every aspect of the implementation process is cost effective.

To implement information technology effectively in administrative offices or classrooms, a school district must have an extensive computer network connecting modern computers; comprehensive, administrative and instructional software and up-to-date operating systems; effective, ongoing training; adequate technical support and an ample professional staff capable of implementing and administering technology. Each component must be addressed in the district's technology plan.

FWISD's Technology Committee establishes the direction for technology in the district. The committee includes board members and members of central office staff, as well as principals and instructional technology specialists.

FINDING

The district does not adequately plan the selection and implementation of software technology. This has prevented the district from maximizing the benefits of its technology investments. **Exhibit 9-9** lists the district's administrative software packages. The primary applications are Comprehensive Information Management System (CIMS), for finance and human resources, and SASIxp, for student information. SASIxp and CIMS are both products of National Computer Systems (NCS).

**Exhibit 9-9
Administrative Software Programs**

Name	Software Description
CIMS	Financial and Human Resources System
SASIxp	Student Database Management System
Integrate Pro	Grade Reporting for Teachers
MS Office 2000	Word Processing, Spreadsheets, etc.
Citrix	Communication
EDGAR	Transportation Tracking & Scheduling
First Class	E-Mail
Hayes Textbook Software	Bar Coding for book checkout
Health System	Tracking System for Nurses
HEAT	Help Desk Call Tracking

ID Card System	Create Picture ID for Library
KRONOS	Time Keeping System
Norton Anti- Virus	Utilities
Resumix	Teacher Applicant Tracking
SNAPS	Food Service
D Data System	Work Order Management System
Smeadlink	Bar Coding System
TSSI	Substitute Teacher Calling System

Source: ITS List of Administrative Software, November, 2000.

In July 1999, the district upgraded its administrative applications for finance and human resources, and the district is upgrading its student information system.

FWISD faces two fundamental problems: many of the district's information systems do not meet the district's basic needs, and implementation projects are often poorly planned.

In July 1999, the district switched from the CIMS finance and human resources software it has used since 1990 to a new CIMS system that meets fewer requirements, and is technologically obsolete. The new system was considered the only option available to the district to meet the Y2K deadline. The 1998 technology planning study concluded that the CIMS software should be upgraded. Over the years, FWISD performed significant customizations to the CIMS products, to the extent the vendor could not efficiently maintain it. New releases issued by the vendor could not be implemented since they would overwrite the district's customizations.

The district followed the advice of Deloitte & Touche and purchased the newest version of CIMS. The system was placed into production on July 1, 1999. District management believed implementing the newest version of CIMS would maximize their already significant investment in its predecessor application, and believed CIMS best met the district's overall needs. The short timetable for implementation also influenced the decision. This timetable did allow a formal needs assessment to identify specific requirements for the new system, and the district did not consider other possible software solutions.

Installing the new software created numerous problems, however, including the inability to place new hires in positions when another

employee currently holds that position. This makes it difficult to track resignations, vacancies and positions that have new hires slotted for them. It also means new employees may not be able to be entered into the position control system until their first day on the job. Records must be kept manually prior to that date.

Since there is no way for new hires to be assigned to positions automatically, even on their start date, someone must manually track which days individuals are eligible to start and enter them on that day. This task is time-consuming, and leaves room for delayed entry. As a result, more than one employee may be entered onto the payroll system for the same position.

The system did not automatically calculate annual salaries based on daily rates and the number of contract days. As a result, staff had to manually calculate and enter hundreds of salaries at the beginning of the school year. This was not only time consuming, but also increased the opportunity for error.

In the old system, there was only one table for each pay grade. With the new system, there is a separate table for each combination of pay grade and contract days. So, rather than maintaining 50 tables for pay grades, the district must maintain 250. Again, this is time consuming and it increases the likelihood of error.

The old system included certain defaults for job codes. When the main assignment for an individual was established, the job codes for supplemental pay were automatically set up with the appropriate budget number, pay table, and tax fields. Under the new system, a separate job code with the necessary information must be set up for each supplemental pay category.

Account numbers are not automatically carried over from the Human Resources system to payroll screens in the new system, so staff in both departments must enter entire account numbers. This provides significant opportunity for error.

The problems with the new system increased the work for staff and increased the opportunity for errors in the data. In addition to increasing the time for data entry, Human Resources Department staff regularly run reports to identify inconsistencies in the data. This is also time consuming. While the software vendor has remedied some of these problems, the majority of inconsistencies remain due to software limitations. The system also has technological limitations. It does not have a user-friendly Windows interface commonly found on current software technology, and

is not Web-supported. NCS has not provided any timetable to the district for additional upgrades to a Web-based system.

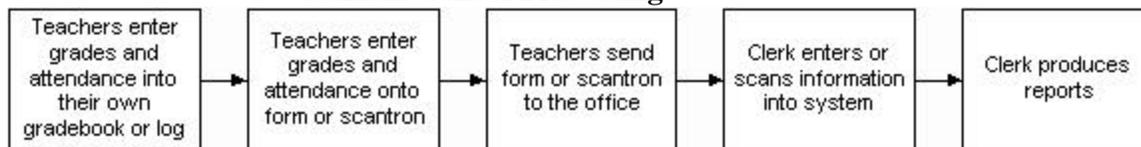
Because the district does not follow a formal methodology for defining requirements for software development or selection, many of the systems in use do not meet important district requirements.

The second major problem facing the district is that information system implementations are not properly planned, resulting in excessive implementation problems, unmet expectations and lost savings opportunities. The district is facing implementation problems with CIMS. District employees are unable to obtain information captured in the system because they either do not have access to it or because they have not been trained to retrieve it. For instance, School Operations requests schools submit position counts by campus. The schools fill out the forms by hand, even though this information should be in CIMS.

Implementation issues are more prevalent in the implementation of the district's student information system. On August 1, 2000, the district put a new student information system, SASIxp, into production. The implementation of this product will continue for several years. Several implementation problems have plagued this project:

- There are no due dates in the software contract with the vendor, undermining the ability of the district to meet deadlines. Some schools were not ready to operate the new system when school started.
- FWISD did not assign a full-time district project manager for the implementation project until April 2000, four months before the system went live.
- Network and training concerns prompted the district to delay the full implementation of the classroom module, which is used for entering student grades and attendance records, until 2002-03. School operating efficiency will not substantially improve until this module is implemented.
- Personnel from some schools did not attend hands-on training before the system was operational. Personnel at these schools received only orientation training before the system was activated.
- Neither school administrators nor clerical personnel are aware of the ultimate capabilities of the new system or how it will affect their operations and staffing requirements. FWISD has not changed its school operating procedures to take advantage of the new student information system. **Exhibit 9-10** illustrates a simplified view of the current process.

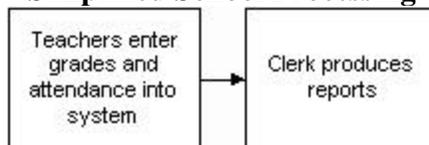
Exhibit 9-10
Current School Processing



Source: Developed from interviews with staff at Meadowbrook Elementary and Kirkpatrick Middle School, October 2000.

SASIXp could significantly streamline school operations. The greatest efficiencies will be realized once the district implements the classroom module of SASIXp. This module will allow teachers to enter grades, attendance and discipline information from the classroom, eliminating the need to enter data at the school office by clerical staff. If the district fully implemented the classroom module, the process would be simplified as described in **Exhibit 9-11**.

Exhibit 9-11
Simplified School Processing



Source: Gibson Consulting Group, based on review of SASIXp software manuals.

New processes and their implications have not been thought through, and no district department is responsible for improving the use of technology.

The district did not adequately map the old system's capabilities, or compare them to the capabilities of the new system. Consequently, many schools have difficulties generating reports needed manage school operations, and are required to use more cumbersome processes.

The implementation of e-mail has also faced obstacles. Until January 2001, some principals did not have access to e-mail, because of hardware or software issues. Thirteen FWISD schools have implemented e-mail campus-wide. E-mail is not the primary means of intra-district communication, even though it has been in place in some form since 1998. The district continues to rely heavily on less efficient fax and phone communications to conduct its business. The new e-mail software, First Class, has been partially installed within central office administration, and has been distributed to campus technology coordinators for installation at the schools.

The implementation of a transportation routing system in August 2000 also caused significant operational problems for the schools. The previous routing system was not compatible with the new system, EDGAR, and conversion plans did not address the incompatibility. Routes were developed manually at the beginning of the year, and contributed to other delays caused by the late receipt of purchased buses.

The implementation of the SNAPS food services system included the use of lunch cards by students. Students lose about 150 cards each day, limiting the effectiveness of the new system. The probability of students losing lunch cards was not adequately addressed in the implementation of SNAPS, resulting in inefficient manual processes.

Schools that effectively implement technology apply standard methodologies to the evaluation, selection and successful implementation of software. These methods include:

- **Process Analysis and Re-engineering:** Process mapping software programs that support the documentation of existing processes and the development of more efficient processes. This exercise also supports the development or revision of operating procedures and job descriptions.
- **Requirements Definition:** Large school districts have unique business requirements that cannot be met by all software. These districts must assign priorities to the different types of requirements to evaluate software options. The requirements definition process also involves all the key stakeholders in the selection of a new information system, instilling a sense of ownership in the system ultimately selected.
- **Implementation Planning.** Software projects must be carefully planned and integrated with other district planning and budgeting efforts. This ensures adequate resources are available to maximize technology.
- **Implementation Project Management:** Software implementation projects must be managed through effective vendor contracts, formal project management responsibilities within the district and a commitment of necessary resources by district management to ensure success.

Recommendation 92:

Develop and implement a formal methodology for the selection, implementation and integration of all technologies based on the best practices of other districts.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Technology Committee directs the chief information officer to develop formal methodologies for developing and implementing information systems using industry best practices.	July 2001
2.	The chief information officer develops five-year application development and implementation plans.	September 2001
3.	The Technology Committee evaluates progress on development and implementation plans and reports progress to the board.	January 2001, and every quarter thereafter

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The District Technology Plan has not been updated since it was created in 1998, and is out of date. Several other documents also guide the district planning process for technology. **Exhibit 9-12** presents the existing planning documents used by FWISD.

Exhibit 9-12 FWISD Technology Planning Documents

Plan Name	Description
Strategic Information Systems Plan	April 1998 by Deloitte & Touche LLP
District Technology Plan	1998-2003
Business Resumption Plan	Disaster Recovery Plan (Draft)
Technology Program, Analysis and Recommendations	TPM Technology, Inc. - November 1999

Source: FWISD ITS Department.

The *District Technology Plan 1998-2003* is the working plan for technology in the district. This plan evolved out of an April 1998 study conducted by Deloitte & Touche that assessed the state of district technology and developed a strategic plan. The *1998-2003 District Technology Plan* represents the district's formal technology planning document, which incorporates the elements of the Deloitte & Touche study.

The 1998 study identified several weaknesses with the district's technology management. About 60 percent of the computers used in schools for administrative or instructional purposes were below the acceptable level for supporting applications and access to the Internet. Forty percent of central office computers were below the acceptable level. The district's technology did not maximize technical support. The district's hardware inventory was maintenance-intensive, and the majority of software applications were not integrated. The majority of FWISD's software applications were either developed by the district, or were packages that were so highly customized that vendors no longer supported them.

The study recommended four broad technology goals, with specific strategies underlying each. **Exhibit 9-13** presents these goals and strategies and the status of each.

Exhibit 9-13

Status of 1998-2003 Technology Plan Initiatives

Goal	Strategy	Status
Establish technology infrastructure	Upgrade network and AS400	AS/400 has been upgraded, most recently to accommodate new software upgrades
	Secure network applications and process	All applications are password protected as are network functions
	Upgrade applications to be Y2K compliant	Done - the upgrade improved some applications, harmed others
	Expand infrastructure to support voice and video	Video is supported - it falls under instructional technologies
	Consolidate all technology maintenance and upgrade functions	Done - all under CIO
	Establish and implement hardware standards	Done - district adopted standards included in study

Reorganize ITS	Align all technology-related functions in the district	Done - CIO position established
	Provide appropriate training for ITS staff	In progress
Provide appropriate training	Establish facilities and program to support training	Not Done
	Establish guidelines for reviewing and purchasing instructional software	Not Done
	Identify teacher computer competencies required for specific grades and content areas	Not Done
	Develop emerging technologies for use in instruction	Not Done
	Develop procedures for monitoring and assessing the effectiveness of the technology plan	Not Done
Involve parents, higher education and the community in technology education	Promote shared use of technology equipment and facilities	Not Done
	Provide community with opportunities for continuing education using technology	Not Done

Source: FWISD District Technology Plan, 1998-2003.

The study recommended updating the plan annually, with the district's Research and Evaluation Department providing data collection support for measuring progress against defined goals. In December 2000, a 10-slide presentation entitled "Technology Plan Update" was prepared by ITS, but the detailed technology plan was not revised or updated. In January 2001, hardware and infrastructure cost estimates were updated by ITS and provided to the review team.

The Research and Evaluation Department also conducted a survey of the effectiveness of instructional technology, but survey results were not

mapped against defined goals. No other evaluation data was collected. The district plans to update its technology plan and present it to the board in 2001. This would be the first update since the 1998-2003 plan was developed.

The lack of a technology planning document inhibits the district's ability to coordinate all technology related activities and move toward defined targets. It also prevents the district from ensuring that the most current technologies are available to the district. Since information technology changes every 18 months, a review of a district's long-range technology plan on an annual basis is essential.

Recommendation 93:

Update the District Technology Plan on an annual basis.

A five-year strategic plan that is reviewed and revised on an annual schedule will provide the district a guideline for the consideration of future technology as well as goals to measure the performance of their technology initiatives against.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board directs the Technology Committee to update the district's technology plan annually and present it to the board.	July 2001
2.	The Technology Committee outlines expectations for the Technology Plan updates and provides input to the CIO during the planning process.	August 2001
3.	The CIO obtains necessary technology research information, status reports, statistics and performance information to support an annual planning effort.	September 2001
4.	The CIO evaluates progress on the previous year's plan and provides an updated plan to the Technology Committee.	November 2001, and annually thereafter

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The district is not taking full advantage of available grants and other funds available for technology.

FWISD, like other districts, spends additional funds on technology that are not reflected as technology expenditures. Capital expenditures for classroom computers, school administrative computers and technology infrastructure costs are charged to other departments. These expenditures are funded through the state technology allotment, bond funds, the Technology Infrastructure Fund (TIF), and E-Rate reimbursement funds. **Exhibit 9-14** presents the sources of funding for all technology related expenditures in 1999-2000.

Exhibit 9-14
FWISD Technology Related Expenditures - All Funding Sources
1999-2000

Funding Source	Amount
Bond-Fund 697 & 698	\$8,783,764
E Rate-Fund 283	\$5,101,850
Technology Allotment-Fund 411	\$2,149,661
TIF Grant-Fund 413	\$480,000
General Fund-Fund 199	\$5,816,776
Total	\$22,332,051

Source: Schedule of all technology related expenditures for 1999-2000, provided by the FWISD CFO in December 2000.

There are several other funding sources used by other Texas school districts to support technology investments. Two federal grants are the Technology Innovation Challenge Grants and the Telecommunications Demonstration Project for Mathematics. There are also foundations that provide funds for school district technology initiatives. The Intel Foundation Community Grant Program provides grants that advance math, computer science and engineering education. These funds are in addition to funds received from Intel through its Public Affairs Program, which makes investments in communities where its employees live and work.

In March 2000, the Bill and Melinda Gates Foundation established a \$350 million, three-year investment in a series of education grants to improve teaching, learning and access to technology. The Digital Blackboard Foundation Grant Program also provides grants up to \$20,000 to improve the use of technology in schools. The School News Funding Center and the U.S. Department of Education are two other organizations that track technology grant programs.

Recommendation 94:

Pursue alternative funding sources for technology expenditures.

The district should aggressively seek other sources of funding to support increasing demands for technology.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The grants coordinator researches federal grants, foundations and other possible funding sources for technology investments, and submits results to the Technology Committee.	July 2001
2.	The Technology Committee evaluates options and directs the grants coordinator to apply for selected grants.	September 2001
3.	The grants coordinator completes applications for grants and tracks their progress.	November 2001

FISCAL IMPACT

The district should be able to achieve a minimum increase in revenues of 1 percent of all technology related funding, or about \$225,000 per year. The district should be able to submit grant applications in 2001-02, obtain half the target level of additional grant funds in 2002-03 and the full amount each year thereafter.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Pursue alternative sources of funding for technology capital expenditures.	\$0	\$112,500	\$225,000	\$225,000	\$225,000

FINDING

While state law requires school districts to have a disaster recovery plan, FWISD has only an incomplete, unapproved and untested draft. From the recent tornadoes in Fort Worth to the outbreak of increasingly complex and devastating computer viruses, the potential for data and information systems losses has never been higher. Large-scale organizations have adopted comprehensive disaster recovery plans for handling the loss of information systems. These plans progress from increasing the frequency of information system backups to far more complex arrangements involving off-site data storage and alternative physical systems.

On March 23, 2000, in a document developed by ITS titled *Response to: "Report to Management, Year ended August 31, 1999,"* multiple recommendations were made to complete a disaster recovery plan. One ITS staff member was trained and provided with software for developing the plan. The plan in its draft format is the result of these recommendations, and was published in March 2000. Although the basics of the plan are in place, there are incomplete areas. For example, many team members have not been assigned, and many details have been left out.

The district has an agreement with IBM to set up an outside processing site, but a contract has not been signed.

Recommendation 95:

Finalize and implement the Disaster Recovery Plan.

The district should publish and maintain a technology infrastructure disaster recovery and business resumption plan. The plan should identify staff assignments and include contingency plans for complete or partial replacement of critical networks, file servers, communications components and all related data and documents. Interim operating plans and procedures, recovery costs and business resumption timelines should be identified for all critical technology-related functions, facilities and operations. Guidelines for business continuity are available from the Texas Department of Information Resources.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief information officer develops a timetable and set of actions to complete and implement the disaster recovery plan.	June 2001
2.	The chief information officer modifies and completes the plan and submits it to the Technology Committee for approval.	June 2001
3.	The Technology Committee presents the plan to the board for approval.	June 2001
4.	The chief information officer tests the disaster recovery plan for effectiveness.	July 2001
5.	The chief information officer implements the disaster recovery plan.	August 2001

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

There are no back-up procedures for some of the district's network servers, leaving programs, utilities and data vulnerable to power fluctuations, viruses and outside intrusions with no method of data recovery available. Backups are an essential part of any network operation and must be performed and documented on a regular schedule.

The AS/400 is subject to back-up procedures, but the procedures are not documented. The AS/400 hosts the core business applications for the district; consequently, any back-up procedure not followed may pose significant risk of data loss.

Written documentation should include specific procedures performed, as well as the documentation of off-site storage and the schedule for backing up data. In the event of data loss, it is necessary to have a schedule and log of events for proper data recovery.

Recommendation 96:

Develop and implement nightly back-up procedures for servers, and document back-up procedures for the AS/400.

Each server or group of servers has an associated backup device and the physical operation should begin as soon as a log is developed and procedures are approved.

Documented back-up procedures for the AS/400 should include, at a minimum, a backup schedule, time of day that backups are processed, a log of the backup device, staff responsibility, an off-site storage schedule, an off-site storage facility and an off-site storage sequence. This document, along with the current log of events, should be available to designated ITS staff at all times.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The manager of Technical Services develops back-up procedures for servers and documents back-up procedures for the AS/400.	June 2001
2.	The chief information officer approves the back-up procedures.	June 2001
3.	The manager of Technical Services implements the back-up procedures.	July 2001

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 9

COMPUTERS AND TECHNOLOGY

C. Instructional Technology

The instructional technology department is responsible for developing and disseminating strategic guidelines for the integration of technology into classroom, campus and district instructional and administrative programs. Instructional technology workers, are responsible for preparing teachers to use technology in their classrooms, supporting technologies used for instruction and conducting technology planning related to instruction.

FWISD's director of Instructional Technology previously reported to the associate superintendent of Curriculum. This position now reports to the chief information officer, following a 1998 technology study recommendation. The director of Instructional Technology helps the district create a common vision for technology; provides staff development to support the integration of technology into instruction and supports equitable student access to technology and information.

Exhibit 9-15 is a representative sample of instructional software used in FWISD.

Exhibit 9-15
FWISD Instructional Software Programs

Name	Software Description
Adopted textbook software	Software associated with textbook adoptions
Accelerated Reader	Reading software
Apple Works	Productivity software
Adobe GoLive	Site-based web master web publishing software
Breakthrough to Literacy	Interactive literacy for Pre-K
Computer Curriculum (CCC)	Drill and practice software for language arts and math
Encarta/Grolier's	Reference software
Hyperstudio/Mpower	Multimedia software
I Can Learn	Algebra lab
Inspiration	Planning software
Josten's	Drill and practice software for language arts and

	math
Keyboarding software	Grade specific software for keyboard skills
KidPix	Art and drawing
Microsoft Teaching and Learning	CD wit projects, lessons and lesson planning ideas
PLATO	Accelerated instructional program for 9 th - 12 th graders
Science 2000	Multi-media science software
Waterford Early Learning	Assists students acquire the ability to read

Source: FWISD ITS Department, October 2000.

FINDING

FWISD schools do not have enough computers to support instruction, and existing computers are not equitably allocated among schools. **Exhibit 9-16** presents the disparity among school ratios of students to computers. The disparity is less for high schools and most significant for elementary schools.

**Exhibit 9-16
FWISD District Instructional Technology Survey
Student-to-Computer Ratios for Fall 2000**

School Type	Student to Computer Ratio	Number of Schools	Percent of Schools
Elementary Schools	< 5	13	18.6%
	5 to 10	41	58.6%
	10 to 15	13	18.5%
	> 15	3	4.3%
Totals		70	100.0%
Middle Schools	< 5	7	30.4%
	5 to 10	12	52.2%
	> 10	4	17.4%
Totals		23	100.0%
High Schools	< 3	3	18.8%

	3 to 4	6	37.5%
	> 4	7	43.7%
Totals		16	100.0%

Source: FWISD Computer Inventory by school, 2000.

In the past, computers were "earned" through teacher-training initiatives, purchased by principals with Title I or grant funds, or donated by parents or businesses. Those schools not qualifying for federal funds or without similar parental/business support obtained fewer computers. This is one factor that led to the inequitable allocation of computers at schools.

In addition to the variance in number of computers at schools, there is also a wide range in the configuration of computers used for instructional purposes. About 2,400 classrooms have one or more Pentium processor or Power Mac computer, as prescribed by the Texas Education Agency's (TEA) minimum standards, but 2,600 classrooms do not have the minimum.

The District Technology Plan 1998-2003 includes instructional technology goals for upgrading computers in schools to the minimum configuration standards of one computer for every three students in the classroom; 24 computers in every elementary computer library and 30 computers in every secondary computer library. The student-to-computer ratio of 3-1 for classroom use is consistent with TEA's recommended standard. The District Technology Plan projected \$2.5 million per year for three years for classroom computers, and more than \$900,000 over a three-year period for library workstations. In 1998-99, the district spent \$1.2 million on computer equipment for direct instruction, and spent \$2.8 million in 1999-2000.

FWISD has 13,876 instructional computers, or 5.6 students per computer. By the end of 2001-02, the district plans to purchase additional instructional computers and workstations to move toward a 4-1 ratio. This level is short of the district's defined target of 3-1. The district spends an average of \$1,300 per computer, including standard software.

The district's progress against this goal has not been tracked, making it more difficult to determine where the district stands on instructional technology. Many school districts track actual statistics against target ratios by school on an annual basis and use this information to modify budgets and allocate technology resources.

Recommendation 97:

Allocate instructional computers to schools based on desired student-to-computer ratios.

The district should develop target student-to-computer ratios for each school. Weight factors can be assigned to allow for special needs or programs, however, the resulting ratio for the district should remain near the target. Existing computers may need to be reallocated to other schools to achieve equity. If computers were obtained with grant funds, the district must ensure grant requirements are not violated before computers are reassigned.

The district should use its projected purchases of computers and workstations to reduce the variances in the student-to-computer ratios among schools in 2001-02.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Technology Committee projects target student-to-computer ratios for each school for five years based on enrollment and special needs.	June 2001
2.	The chief information officer and the associate superintendent for School Operations develop a three-year computer allocation plan based on existing computers and planned purchases.	June 2001
3.	The superintendent approves the computer allocation plan.	July 2001
4.	The chief information officer executes the computer allocation plan over a three-year period.	August 2001 - May 2004

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

FINDING

Despite the implementation of programs to better integrate technology into teaching, FWISD teachers do not have the tools and training necessary to successfully integrate technology into instruction.

Several programs and resources support instructional technology at FWISD:

- Teacher Technologist Training Institute: This "train the trainer" program provides 65 hours of required training to teacher technologists. They are in turn required to provide 36 hours of

technology staff development to faculty, staff or students within their school or schools with students who will eventually attend the school. The teacher technologists assist in the evaluation and selection of instructional software and improvement of instruction through the integration of technology;

- Technology Boot Camp: This intensive 5-day program provides beginning training for teachers who have never used a computer, with a focus on how to integrate computers with instruction and classroom management;
- Step Up 2000: This program updates computer skills by providing advanced training on topics including the Internet and integrating technology into the curriculum;
- TECHS (Technology Enhanced Curriculum - Hot Stuff) Seminar: This five-day program focuses on advanced training in multimedia and web development to enhance instruction;
- Intel Programs: FWISD was a pilot site for the Intel Applying Computers in Education Program in 1998. About 180 district employees participated in this program. The district also participated in Intel's Teach to the Future Program in 1999. Both of these programs provided staff development in multimedia, Web development, desktop publishing, the Internet, teacher productivity, lesson planning and instructional software applications;
- Take the Class Get the Software: This program allows teachers to receive training on instructional software and provides the software;
- Specialty Training: The department of Instructional Technology offers specialists to provide training requested by schools in using the Internet in instructional curriculum and instructional software application training;
- Multimedia Lab: This lab contains computers, cameras, TVs, VCRs, laser disc players, a digital microscope, recordable CD writers and color laser printers used to develop instructional multimedia projects; and
- Preview Center: Makes previews of the latest digital curriculum-based software available. The center includes technology-based lesson plans and teacher evaluations of software.

Though there are numerous programs available, the majority of FWISD teachers do not believe that there is adequate support for integrating technology with instruction. The Research and Evaluation Department conducted a School Effectiveness Teacher Survey in July 2000, seeking input on the effectiveness of instructional technology. **Exhibit 9-17** presents elementary, middle school and high school teachers' perceptions of technology and computer-assisted instruction.

Exhibit 9-17
FWISD 2000 District School Effectiveness Teacher Survey:
Instructional Technology Questions

	Elementary School Percent Agree	Middle School Percent Agree	High School Percent Agree
My school provides me with the tools I need to integrate technology in the classroom.	44.4%	40.7%	41.9%
My school provides me with the training I need to integrate technology in the classroom.	48.6%	44.1%	42.7%
I use computers and related technology in my instruction.	50.3%	50.6%	54.5%
The computer-assisted instructional programs used at my school are effective.	29.7%	27.9%	26.6%
Students are better readers as a result of computer-assisted instructional programs.	29.2%	23.4%	20.9%
Students are better at mathematics as a result of computer-assisted instructional programs.	21.1%	18.4%	20.7%

Source: FWISD Research and Evaluation-Survey Results for Elementary, Middle, and High Schools, July 2000.

Teachers' responses are generally consistent across school levels, and show that less than half of the district's teachers believe they have adequate tools and training to integrate technology with instruction. About half of FWISD's teachers use technology to support instruction in the classroom. In general, less than a third of the teachers believed existing computer-assisted instructional programs improved student learning.

The survey found that the most successful integration of technology was in Career and Technology programs, in science classrooms with textbook-aligned programs, within the grade 9 grant-funded initiative, and in the high school algebra "I Can Learn" labs. Academic results relating to the "I Can Learn" labs presented to the board in November did not show sufficient improvement. The passing rate for students in the "I Can Learn" labs was higher than the comparison group, but fell short of district expectations.

The teacher and principal surveys conducted during this performance review reflected similar results (**Exhibits 9-18 and 9-19**).

Exhibit 9-18
TSPR Teacher Survey - Technology Issues

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	Students regularly use computers.	9.6%	35%	5.5%	34.8%	15.1%
2.	Students have regular access to computer equipment and software in the classroom.	7.2%	27.9%	4.1%	39.9%	20.9%
3.	Teachers know how to use computers in the classroom.	8.4%	42.5%	10.7%	29.6%	8.8%
4.	Computers are new enough to be useful for student instruction.	7.2%	32.3%	7.4%	32.8%	20.3%
5.	The district meets students' needs in classes in computer fundamentals.	6.0%	29.8%	13.1%	31.9%	19.3%
6.	The district meets students' needs in classes in advanced computer skills.	3.6%	17.3%	29.7%	29.7%	19.7%
7.	Teachers and students have easy access to the Internet.	4.8%	16.7%	10.5%	34.5%	33.6%

Source: TSPR Survey.

Exhibit 9-19
TSPR Principal Survey - Technology Issues

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	Students regularly use computers.	22.3%	41.7%	2.9%	26.2%	6.8%

2.	Students have regular access to computer equipment and software in the classroom.	17.5%	38.8%	2.9%	33.0%	7.8%
3.	Computers are new enough to be useful for student instruction.	14.7%	43.1%	4.9%	23.5%	13.7%
4.	The district meets student needs in computer fundamentals.	6.8%	38.8%	4.9%	33.0%	16.5%
5.	The district meets student needs in advanced computer skills.	3.9%	21.6%	20.6%	35.3%	18.6%
6.	Teachers know how to use computers in the classroom.	2.9%	40.8%	7.8%	39.8%	8.7%
7.	Teachers and students have easy access to the Internet.	4.9%	31.1%	6.8%	36.9%	20.4%

Source: TSPR Survey.

The district is organizing a committee of business leaders, teachers and administrators to address instructional technology planning. This committee will begin meeting in January 2001, and will report results to the district Technology Committee.

On May 5, 2000, the State Board for Educator Certification approved five certification standards in technology applications for all beginning teachers of Early Childhood-Grade 4 and Grades 4-8. These same five standards for all beginning teachers in Grades 8-12 are available for public comment before adoption. The proposed draft standards reflect the requirements for the knowledge and skills for which the beginning teacher of technology applications will be responsible. The drafts are based on the corresponding Texas Essential Knowledge and Skills (TEKS) for Technology Applications in Grades 8-12. The Technology Applications 8-12 standards will be used in developing working drafts of certification test frameworks.

The five-certification standards that apply to all beginning teachers in grades 8-12 include:

- Standard I - All teachers use technology-related terms, concepts, data input strategies and ethical practices to make informed decisions about current technologies and their applications (approved for EC-Grade 4 and Grades 4-8);
- Standard II - All teachers identify task requirements, apply search strategies and use current technology to efficiently acquire, analyze and evaluate a variety of electronic information (approved for EC-Grade 4 and Grades 4-8);
- Standard III - All teachers use task-appropriate tools to synthesize knowledge, create and modify solutions and evaluate results in a way that supports the work of individuals and groups in problem-solving situations (approved for EC-Grade 4 and Grades 4-8);
- Standard IV - All teachers communicate information in different formats and for diverse audiences (approved for EC-Grade 4 and Grades 4-8); and
- Standard V - All teachers know how to plan, organize, deliver and evaluate instruction for all students that incorporates the effective use of current technology for teaching and integrating TEKS into the curriculum (approved for EC-Grade 4 and Grades 4-8).

School districts have applied different approaches for improving the integration of technology with teaching. Approaches include providing a full-time technology coordinator at schools with no teaching responsibilities; providing teachers with laptop computers to increase their use of technology; marketing successful approaches at individual schools to other schools in the district; requiring annual technology training for all teachers and setting competency standards for teachers.

Recommendation 98:

Incorporate instructional technology goals into the District Strategic Plan and develop performance measures to track progress.

The inclusion of instructional technology in the District Strategic Plan will place a higher priority on its performance. District management should supplement its teacher survey by reviewing participation rates by school, fees charged for training and participant evaluations of specific professional development programs. Ineffective programs should be eliminated and new ones evaluated.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board establishes a district goal and accompanying performance measures for instructional technology and incorporates them into the District Strategic Plan.	June 2001
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2.	The Instructional Technology Committee defines the objectives and scope of the instructional technology assessment.	July 2001
3.	The Instructional Technology Committee researches alternative approaches to improve the integration of technology with instruction.	November 2001
4.	The chief information officer and chief financial officer identify and evaluate alternative funding sources to support instructional technology needs.	December 2001
5.	The subcommittee for Instructional Technology finalizes the instructional technology improvement plan and submits to the Technology Committee for approval.	January 2002
6.	The Technology Committee incorporates the instructional technology plan into the district's five-year technology plan and submits to the board for approval.	February 2002

FISCAL IMPACT

This recommendation can be implemented with existing resources.

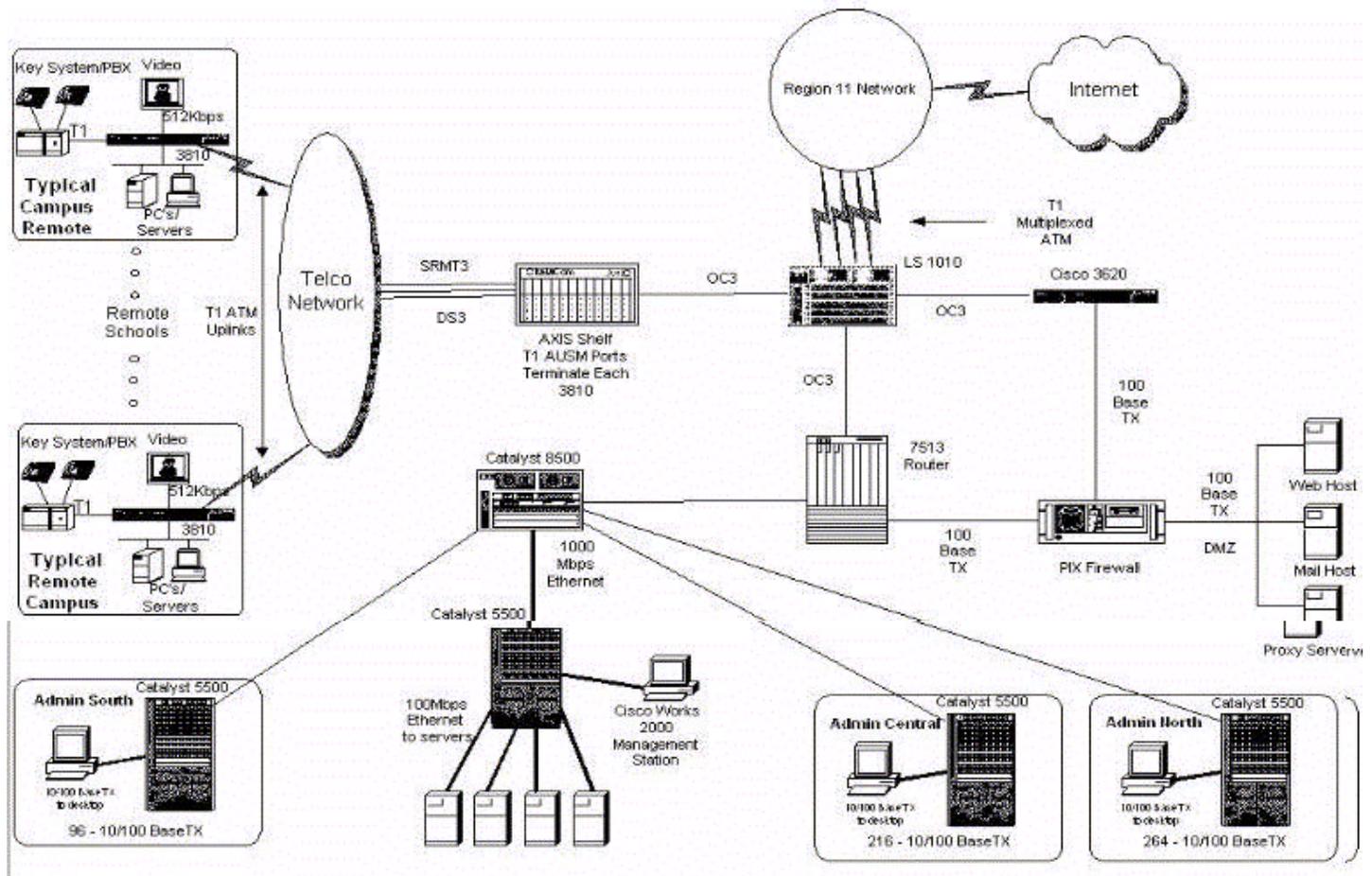
Chapter 9 COMPUTERS AND TECHNOLOGY

D. Technology Infrastructure and Hardware

The technology environment at FWISD is comprised of 275 network servers located at the central administration site and at individual schools. In addition to these servers, an IBM AS/400 mid-range computer is used primarily for CIMS, a finance and human resource system. Users access the AS/400 through the district's wide area network using Rumba, which allows networked computers to act as a terminal to the AS/400 for processing.

The district's hardware is connected through a complex telecommunications infrastructure. (Exhibit 9-20)

Exhibit 9-20
FWISD Telecommunication Infrastructure
September 2000



Source: FWISD ITS Department.

Hardware operations are managed through Operations, Technical Services and Field Services. The manager of Operations is responsible for operating the AS/400 with the assistance of three operator positions. The manager of Technical Services and five employees support the servers and telecommunications network. Twelve field service technicians (FSTs) maintain the personal computers and peripheral equipment at schools. These employees report to the supervisor of Field Services.

FINDING

FWISD has standards for new computer purchases. The Technology Standards appendix of the *District Technology Plan 1998-2003* provides a comprehensive and accurate procedure for all technology acquisitions. **Exhibit 9-21** presents the district's computer hardware standards.

**Exhibit 9-21
FWISD PC Hardware Standards
1998-2003**

PC Workstation	Campus Server
Dell, Hewlett-Packard or Tangent	Dell PowerEdge 2300 Only
350mHz Intel Pentium II processor	350mHz Intel Pentium processor
512K cache, MMX	8MB level 2 cache
128 MB of SDRAM (main memory)	256 MB of RAM
1031 GB Ultra IDE hard drive, Fat32 setup	Two 9 GB hard drives
40X CD-Rom drive	24X CD-Rom
SVGA video graphics with 8 MB RAM	SVGA video graphics with 2 MB memory
10/100 Intel EtherExpress Pro 10baseT network card (PCI)	Two Intel EtherExpress Pro 10/100 10baseT network card (PCI)
1.44 MB floppy drive	1.44 MB floppy drive
Iomega Zip 100 MB Drive	2 USB ports
100 MB system bus, 2 USB ports	Seagate 8 mm DAT tape backup, 12/24 GB
PCI 3D stereo surround sound, 64v wave table	APC Smart UPS
15" SVGA non-interlaced color monitor	
Case options: desktop or mini-tower	
User Guide, documentation and master CD	
Novell and Windows certified	
Windows 98 and related software	
Windows 98 computer-based training software	

Microsoft Office Suite	
Intel LanDesk client manager	
Lifetime toll free technical support	
Vendor install and setup, shipping included	
5 year on-site parts and labor warranty	

Source: FWISD District Technology Plan 1998-2003, appendix.

These standards are detailed and are easily understood, which ensure compliance when district staff members submit a request for any new technology. Not only is there the potential for significant savings in the purchase of technology-related equipment, software and supplies when standardization is applied, but efficiency of manpower use is increased.

COMMENDATION

FWISD's minimum standards for new computers will help ensure the use of technology that is compatible with the district's computer hardware.

FINDING

FWISD's hardware inventory listing is not accurate. The TSPR review team performed an inventory verification test at one school. Out of 78 items, 48 were listed improperly. Some equipment was on the inventory and listed as functional, but was not used. Other equipment was not tagged, even though the district has had a tagging procedure in place for 10 years.

The computer inventory listing is updated as items are sold or purchased. The inventory is not verified through periodic counts, and no district employee is responsible for conducting such counts.

Accurate inventory information is critical for planning equipment purchases, preventing and providing a deterrent for theft, and properly allocating computing resources.

Recommendation 99:

Conduct an annual physical count of hardware inventory.

The inventory should include the item, brand name, model number, serial number, bar code number, date of purchase, type of equipment, an indicator that the item meets minimum specifications, an indicator that the equipment is being used and a description of the item's primary use. All untagged equipment inventoried should be tagged.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer and the chief information officer develop a physical inventory plan and	June
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	schedule.	2001
2.	The chief information officer directs the technology coordinators at each campus to conduct a physical inventory of all technology showing configuration and age, and other required data elements.	July 2001
3.	The Internal Audit department participates in selected counts and verifies school inventories.	July 2001

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 10

STUDENT TRANSPORTATION

This chapter reviews the Fort Worth Independent School District (FWISD) student transportation function in five sections:

- A. Organization and Staffing
- B. Routing and Scheduling
- C. Training and Safety
- D. School Bus Maintenance
- E. Outsourcing Student Transportation

The primary goal of every school district's Transportation Department is to transport all students to and from school and approved extracurricular functions in a timely, safe and efficient manner.

BACKGROUND

The Texas Education Code authorizes, but does not require, Texas school districts to provide transportation for students in the general population between home and school, from school to career and technology training locations and for 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 receive special education services.

The FWISD Transportation Department transported an average of 11,251 students a day between school and home on regular routes and 1,356 students a day on special education routes in 1998-99. FWISD owned, operated and maintained a fleet of 236 regular school buses and 144 special school buses. In 1998-99, FWISD operated a total of 3,304,605 miles of regular transportation and 2,164,377 miles of special education transportation. The district's expenditures were \$7,493,781 for regular transportation and \$4,810,814 for special education transportation.

Texas school districts are eligible to receive state funding reimbursement for transporting regular education, special education and career and technology program students. The Texas Legislature sets funding rules, and TEA administers the program. State funding for regular education transportation is limited to transportation for students living two or more miles from the school they attend. The state does not reimburse districts for transporting students living within two miles of the school they attend unless they face hazardous walking conditions on the way to school, such as the need to cross a four-lane roadway without a traffic signal or

crossing guard. A school district must use local funds to pay for transportation costs the state allotment does not cover.

For regular education, the state reimburses districts for qualifying transportation expense based on linear density. The Texas Education Agency's *Handbook on School Transportation Allotments*, which was revised May 2000, says "linear density is calculated as the reported total average daily ridership for only two-or-more-mile students divided by the reported total daily miles traveled to serve them (as derived from only regular standard subprogram data reported for the first school year of the preceding biennium)." The ratio does not include miles or riders for alternative schools, bilingual education, desegregation purposes, magnet schools, parenting classes or year-round regular transportation or hazardous area service.

TEA uses this ratio to assign each school district to one of seven linear density groups. Each group is eligible to receive a maximum per mile allotment. TEA evaluates these group assignments every two years by recalculating linear densities with data from the first of the previous two school years. **Exhibit 10-1** shows the current linear density groups and the associated allotment per mile.

Exhibit 10-1
Linear Density Groups

Linear Density Group	Allotment Per Mile
2.40 and above	\$1.43
1.65 to 2.40	\$1.25
1.15 to 1.65	\$1.11
.90 to 1.15	\$0.97
.65 to .90	\$0.88
.40 to .65	\$0.79
up to .40	\$0.68

Source: Texas Education Agency Handbook on School Transportation Allotments, revised May 2000.

In 1998-99, FWISD was in the sixth highest linear density group, which entitled the district to a reimbursement of \$1.25 per mile for regular

education route miles. The district's actual cost was \$2.27 per mile in 1998-99. **Exhibit 10-2** shows the linear densities for FWISD and a peer group of Texas school districts. FWISD is receiving the peer average \$1.25 allotment per mile. Due to the reporting deadlines for the Texas Education Agency (TEA) School Transportation Operation Report, some 1999-2000 transportation data were not available in December 2000. For the sake of consistency, the 1998-99 data are used throughout this chapter unless otherwise noted.

Exhibit 10-2
FWISD and Peer ISD Linear Density
1998-99

District	Standard Regular Riders	Standard Regular Miles	Linear Density	Allotment Per Mile
Dallas County	5,514,300	3,020,209	1.826	\$1.25
El Paso	683,100	331,100	2.063	\$1.25
Austin	1,669,680	1,277,316	1.307	\$1.11
Houston	2,545,380	1,026,324	2.480	\$1.43
Peer Average	2,603,115	1,413,737	1.841	\$1.25
Fort Worth	1,451,520	811,260	1.789	\$1.25

Source: TEA School Transportation Route Services Reports 1998-99.

Reimbursement for special education transportation is not based on linear density. The per mile allotment rate for special education is set by the Texas Legislature. All transportation for special education, except certain field trips, is eligible for state reimbursement at \$1.08 per mile. In 1998-99, the FWISD actual cost for special education was \$2.22 per mile.

The reimbursement per mile for the career and technology program is based on the cost for regular education program miles for the previous fiscal year as reported by the district in the TEA School Transportation Operation Report. In 1998-99, FWISD received \$1.96 allotment per mile for 202,306 reimbursable career and technology transportation miles.

Reimbursable miles are the miles driven on routes (with students on board) and do not include deadhead (miles driven to or from a route) or maintenance miles (miles driven for maintenance purposes). FWISD operated 2,539,075 reimbursable regular education route miles and 1,543,066 reimbursable special education route miles in 1998-99.

Reimbursable miles for regular education include transportation for special programs such as alternative schools, bilingual education, magnet schools, parenting programs and summer school. Miles for routes that service these programs are reimbursed at the regular education rate determined by the linear density group for standard miles. In 1998-99, reimbursable regular education route miles included 827,100 standard miles, 274,825 miles for alternative programs, 164,160 miles for bilingual programs, 638,280 miles for magnet schools, 155,700 miles for parenting programs and 299,579 miles for year round school.

Exhibit 10-3 shows a comparison of reimbursable route miles and other odometer miles for FWISD and the peer group of Texas school districts.

Exhibit 10-3
FWISD and Peer ISD Odometer Miles by Category
1998-99

	Regular Education			Special Education		
	Route Miles	Extra-curricular Miles	Deadhead/ Other	Route Miles	Extra-curricular Miles	Deadhead/ Other
Dallas County	6,721,081	1,226,880	52,290	6,355,452	8,902	40,352
El Paso	808,780	261,621	692,421	1,009,826	27,106	860,516
Austin	2,394,667	262,874	990,869	1,859,784	0	894,434
Houston	8,792,352	970,686	2,370,533	5,293,044	82,235	2,848,233
Peer Average	4,679,220	680,515	1,026,528	3,629,527	29,561	1,160,884
Fort Worth	2,539,075	409,472	356,058	1,543,066	10,191	611,120

Source: TEA School Transportation Operation Report and School Transportation Route Services Reports 1998-99.

In 1998-99, the state allocated a total of \$5 million in transportation funding to FWISD. The state reimbursement was 40.5 percent of the total annual operations cost. **Exhibit 10-4** provides a comparison of total annual operations cost and the state allotment for regular and special transportation in 1998-99 for FWISD and the peer districts. Career and technology transportation is included with regular education.

Exhibit 10-4
FWISD and Peer ISD State Reimbursement
1998-99

	Regular Education			Special Education		
	Operations Cost*	State Allotment	Percent State	Operations Cost*	State Allotment	Percent State
Dallas County	\$17,899,853	\$8,624,993	48%	\$12,745,223	\$6,869,888	54%
El Paso	\$7,011,193	\$1,327,829	19%	\$4,345,459	\$1,090,612	25%
Austin	\$7,164,367	\$2,720,790	38%	\$5,975,174	\$2,008,567	34%
Houston	\$27,540,845	\$12,970,816	47%	\$8,957,329	\$5,716,488	64%
Peer Average	\$14,904,065	\$6,411,107	43%	\$8,005,796	\$3,921,389	50%
Fort Worth	\$7,493,781	\$3,346,075	45%	\$4,810,814	\$1,641,806	34%

Source: TEA School Transportation Operation Report and School Transportation Route Services Reports 1998-99.
**Operations cost excludes capital outlay and debt service.*

The percent of operations cost reimbursed for FWISD regular education transportation is the third highest of the peer districts, and higher than the peer average. The percentage of operations costs reimbursed for special education is lower than the peer average.

Exhibit 10-5 shows the annual riders, total annual odometer miles and number of total buses for FWISD compared to peer districts for 1998-99.

Exhibit 10-5
FWISD and Peer ISD Operating Statistics
1998-99

	Regular Education			Special Education		
	Annual Riders*	Total Odometer Miles	Total Buses	Annual Riders*	Total Odometer Miles	Total Buses
Dallas	7,112,160	8,000,251	925	1,083,960	6,404,706	389

County						
El Paso	1,477,620	1,762,822	186	329,940	1,897,448	108
Austin	2,845,800	3,648,410	264	418,140	2,754,218	208
Houston	6,734,340	12,133,571	779	3,348,900	8,223,512	569
Peer Average	4,542,480	6,386,264	539	1,295,235	4,819,971	319
Fort Worth	2,122,380	3,304,605	236	298,080	2,164,377	144

Source: TEA School Transportation Operation Report and School Transportation Route Services Report 1998-99.

** Annual riders calculated by multiplying average daily riders by 180 school days.*

The FWISD regular education riders, annual miles and number of total buses are similar to Austin ISD. The FWISD annual miles of special education transportation are similar to Austin ISD and El Paso ISD. The number of FWISD special education riders is the lowest of all the peer districts.

Exhibit 10-6 compares transportation cost effectiveness indicators for 1998-99 for FWISD and the peer districts. Miles used for calculating the cost per mile are taken from the TEA School Transportation Operation Report and are derived from odometer readings. These miles include deadhead, maintenance runs and other sources of added miles.

**Exhibit 10-6
FWISD and Peer ISD Cost Effectiveness Indicators
1998-99**

District	Regular Education		Special Education	
	Cost/Mile	Cost/Rider	Cost/Mile	Cost/Rider
Dallas County	\$2.24	\$2.52	\$1.99	\$11.76
El Paso	\$3.98	\$4.74	\$2.29	\$13.17
Austin	\$1.96	\$2.52	\$2.17	\$14.29
Houston	\$2.27	\$4.09	\$1.09	\$2.67

Peer Average	\$2.61	\$3.47	\$1.88	\$10.47
Fort Worth	\$2.27	\$3.53	\$2.22	\$16.14
Percent Different from Average	-13%	2%	18%	54%

Source: TEA School Transportation Operation Report and School Transportation Route Services Report 1998-99.

FWISD regular education cost per mile is lower than the peer average, and the cost per rider is slightly higher than the peer average. Special education cost per mile is higher than the peer average. The FWISD cost per rider for special education is the highest of all the school districts in the peer group.

Exhibit 10-7 includes service effectiveness indicators for FWISD and the peer districts.

Exhibit 10-7
FWISD and Peer ISD Service Effectiveness Indicators
1998-99

District	Regular Education		Special Education	
	Riders/Mile	Riders/Bus	Riders/Mile	Riders/Bus
Dallas County	0.89	43	0.17	15
El Paso	0.84	44	0.17	17
Austin	0.78	60	0.15	11
Houston	0.56	48	0.41	33
Peer Average	0.77	49	0.23	19
Fort Worth	0.64	50	0.14	12
Percent Different from Average	-17%	2%	-39%	-37%

Source: TEA School Transportation Operation Report and School Transportation Route Services Report 1998-99.

Special education service effectiveness indicators are low compared to peer districts. FWISD is less than 39 percent as productive as the other districts in terms of riders per mile and 37 percent as productive as the other districts in terms of riders per bus. FWISD transports about the same

number of regular education student riders per bus as the peer average. The number of regular student riders per mile is 17 percent less than the peer average.

Exhibit 10-8 documents a five-year history of the total miles of transportation service provided by FWISD by category of service. The number of annual miles of service has not changed significantly from year to year.

**Exhibit 10-8
FWISD Annual Miles of Service
1994-95 through 1998-99**

	1994-95	1995-96	1996-97	1997-98	1998-99
Regular Miles					
Route Miles (with Deadhead)	2,455,887	2,632,938	2,483,122	2,539,853	2,539,075
Extracurricular Miles	442,894	415,958	752,541	478,114	409,472
Other Miles	329,837	133,218	481,055	452,757	356,058
Annual Regular Miles	3,228,618	3,182,114	3,716,718	3,470,724	3,304,605
Special Miles					
Route Miles (with Deadhead)	1,673,266	1,733,383	1,643,385	1,725,170	1,543,066
Extracurricular Miles	4,784	800	8,780	12,560	10,191
Other Miles	451,465	666,359	445,868	556,675	611,120
Annual Special Miles	2,129,515	2,400,542	2,098,033	2,294,405	2,164,377
TOTAL	5,358,133	5,582,656	5,814,751	5,765,129	5,468,982

Source: TEA School Transportation Operation Reports, 1994-95 through 1998-99.

Exhibit 10-9 compares the total and extracurricular transportation miles of peer districts. Extracurricular miles include student transportation for field trips and extracurricular activities such as athletics, band and University Interscholastic League (UIL) events. Extracurricular miles are about 8 percent of total odometer miles for FWISD, similar to Dallas County and El Paso ISD.

Exhibit 10-9
Peer Extracurricular Miles
1998-99

District	Total Odometer Miles	Extracurricular Miles	Percent Extracurricular
Dallas County	14,404,957	1,235,782	9%
El Paso	3,660,270	288,727	8%
Austin	6,402,628	262,874	4%
Houston	20,357,083	1,052,921	5%
Peer Average	11,206,235	710,076	6%
Fort Worth	5,468,982	419,663	8%

Source: TEA School Transportation Operation Report, 1998-99.

Exhibit 10-10 compares the transportation cost of the peer districts with FWISD as a percentage of total district expenditures.

Exhibit 10-10
Peer Transportation Cost as a Percent of Total Operating Expenditures
1998-99

District	Total District Expenditures	Transportation Operations Cost	Percent of Total Expenditures
Dallas County	\$843,197,311	\$30,645,076	3.6%
El Paso	\$307,572,642	\$11,356,652	3.7%
Austin	\$391,971,530	\$13,139,541	3.4%
Houston	\$1,119,486,868	\$36,498,174	3.3%
Peer Average	\$665,557,088	\$22,909,861	3.4%
Fort Worth	\$401,563,201	\$12,304,595	3.1%

Source: Total expenditures from PEIMS data, 1998-99. Transportation operations cost from TEA School Transportation Operation Report FY 1998-99.

Peer districts allocate between 3 and 4 percent of total expenditures for student transportation. FWISD is at the low end of this range, allocating 3.1 percent of total expenditures, or \$12,304,595 for student transportation.

TEA transportation reports provide a five-year history for FWISD transportation service. Since 1994-95, the total miles of transportation increased by 2 percent and riders decreased by 8 percent, while transportation cost increased 21 percent (**Exhibit 10-11**).

Exhibit 10-11
FWISD Regular and Special Education Transportation Operations
Cost
1994-95 through 1998-99

	1994-95	1995-96	1996-97	1997-98	1998-99	Percent Change
Operations Cost						
Regular Education	\$6,181,662	\$6,464,866	\$6,763,301	\$6,340,894	\$7,493,781	21%
Special Education	\$3,958,282	\$3,941,318	\$4,074,216	\$4,267,252	\$4,810,814	22%
Total	\$10,139,944	\$10,406,184	\$10,837,517	\$10,608,146	\$12,304,595	21%
Annual Odometer Miles						
Regular Education	3,228,618	3,182,114	3,716,718	3,470,724	3,304,605	2%
Special Education	2,129,515	2,400,542	2,098,033	2,294,405	2,164,377	2%
Total	5,358,133	5,582,656	5,814,751	5,765,129	5,468,982	2%
Cost per Mile						
Regular Education	\$1.91	\$2.03	\$1.82	\$1.83	\$2.27	18%
Special Education	\$1.86	\$1.64	\$1.94	\$1.86	\$2.22	19%
Annual Riders						
Regular Education	2,178,720	2,135,520	2,257,200	2,194,380	2,025,180	-7%
Special	286,200	289,980	301,860	321,660	244,080	-15%

Education						
Total	2,464,920	2,425,500	2,559,060	2,516,040	2,269,260	-8%
Cost per Rider						
Regular Education	\$2.84	\$3.03	\$3.00	\$2.89	\$3.70	30%
Special Education	\$13.83	\$13.59	\$13.50	\$13.27	\$19.71	43%

Source: TEA School Transportation Operation Report, 1994-99; TEA School Transportation Route Services Report 1994-99; operations cost exclude capital outlay and debt service.

Regular education transportation operations cost increased by 21 percent from 1994-95 to 1998-99. During the same period, the number of miles operated increased by 2 percent and annual riders decreased by 7 percent. The cost per mile for regular education increased 18 percent from \$1.91 per mile in 1994-95 to \$2.27 per mile in 1998-99. In the five-year period, the cost per rider increased 30 percent from \$2.63 per rider to \$3.53 per rider.

Special education transportation operations cost increased 22 percent from 1994-95 to 1998-99 and miles increased 2 percent. The cost per mile increased from \$1.86 per mile in 1994-95 to \$2.22 per mile in 1998-99, an increase of 19 percent. The number of special education student riders decreased 15 percent during the five-year period.

The largest decrease in student riders was from 321,660 riders in 1997-98 to 244,080 riders in 1998-99, a decrease of 24 percent. The cost per student education rider was \$19.17 in 1998-99, an increase of 49 percent more than \$13.27 in 1997-98. The director of Transportation said the number of student riders was reduced by working with the Admission, Review and Dismissal (ARD) committee to assign only those students with special needs to special education routes. The ARD committee recommends to the Transportation Department which students should ride special education buses. Students in special education programs who do not have a physical disability or other special need are assigned to regular education routes.

Exhibit 10-12 summarizes FWISD transportation operations cost for each of five years by object of expenditure.

Exhibit 10-12
FWISD Transportation Operations Cost by Type of Expenditure
1994-95 through 1998-99

Object	1994-95	1995-96	1996-97	1997-98	1998-99
Salaries & Benefits	\$8,300,732	\$8,589,825	\$8,920,069	\$8,949,167	\$10,590,719
Purchased Services	\$435,861	\$412,974	\$392,756	\$431,626	\$485,721
Supplies and Material	\$1,049,844	\$1,112,124	\$1,264,926	\$1,207,390	\$1,196,526
Other Expenses	\$353,507	\$291,261	\$259,766	\$19,963	\$31,629
Total Cost	\$10,139,944	\$10,406,184	\$10,837,517	\$10,608,146	\$12,304,595

Source: TEA School Transportation Route Services Reports, 1994-95 through 1998-99.

Total FWISD operations cost for student transportation increased 16 percent from 1997-98 to 1998-99. The salaries and benefits line item increased 18 percent during that same time period. The increase in salaries and benefits cost in 1998-99 was due, in part, to a 3-percent increase in wage rates for hourly personnel (16 percent for bus attendants). The director of Transportation said other factors affecting cost were an increase in the number of guaranteed hours for bus drivers from four hours per day to five hours per day, a large number of absences due to workers' compensation claims and an increase in overtime hours. Salaries and benefits made up 86 percent of all operations cost in 1998-99.

Chapter 10

STUDENT TRANSPORTATION

A. Organization and Staffing (Part 1)

The Transportation Department is responsible for providing student transportation between home and school and for special trips, and maintains and services all school buses. The department operates from two facilities. Clark Field is located on Wichita near IH 20, and the Westside facility is located on Longview on the west side of Fort Worth.

The Transportation Department is divided into three main areas: operations, routing and scheduling, and maintenance. The director of Transportation reports to the associate superintendent for Non-instructional Services. The manager of Transportation, the route/schedule coordinator and the maintenance manager report to the director of Transportation.

A liaison officer facilitates communication between management and drivers. The liaison reports to the associate superintendent for Non-instructional Services, but is included in the Transportation Department budget. The duties of the liaison officer are to work with the director of Transportation and the manager of Transportation to resolve concerns of employees and to ensure employees understand all policies and regulations concerning work-related issues. The position of liaison officer was created in 1997.

The manager of Transportation is responsible for transportation services, training and safety. Two lot supervisors, one for Clark Field and one for Westside, report to the manager of Transportation. The lot supervisors are responsible for ensuring all routes are covered each day and ensuring drivers keep the paperwork for each route up to date. Two assistant lot supervisors are assigned to Clark Field to help with the lot supervisor's duties. One assistant lot supervisor is also responsible for scheduling field trips.

Five safety officers are responsible for field support for Transportation and report to the manager of Transportation. The safety officers report to the scene of any accident or incident involving a school bus. Safety officers assist drivers with student discipline on school buses as needed. The safety officers are also responsible for reviewing bus routes and bus stops to ensure safe operation. One safety officer works to recruit new drivers.

The 2000-01 budget for the Transportation Department includes 420 drivers and 98 bus attendants. A bus attendant is assigned to a special education route when required to assist with the special needs of students.

FWISD uses team leaders to help supervise drivers. Ten team leaders are assigned to the two facilities (eight to Clark Field and two to Westside). Team leaders are responsible for answering drivers' questions, helping drivers with problems and ensuring drivers complete the paperwork for their route. Some team leaders are also assigned special administrative duties. For example, a team leader for Westside also serves as the part-time parts clerk. A team leader for Clark Field is responsible for data entry of student discipline forms. Team leaders also drive school bus routes when there are not enough drivers available.

Five drivers are assigned part-time duties as dispatchers. Four dispatchers report to Clarke Field and one reports to Westside. FWISD job descriptions state dispatchers report to both the lot supervisors and the assistant lot supervisors. When there are not enough drivers for all routes, the dispatchers must drive open routes.

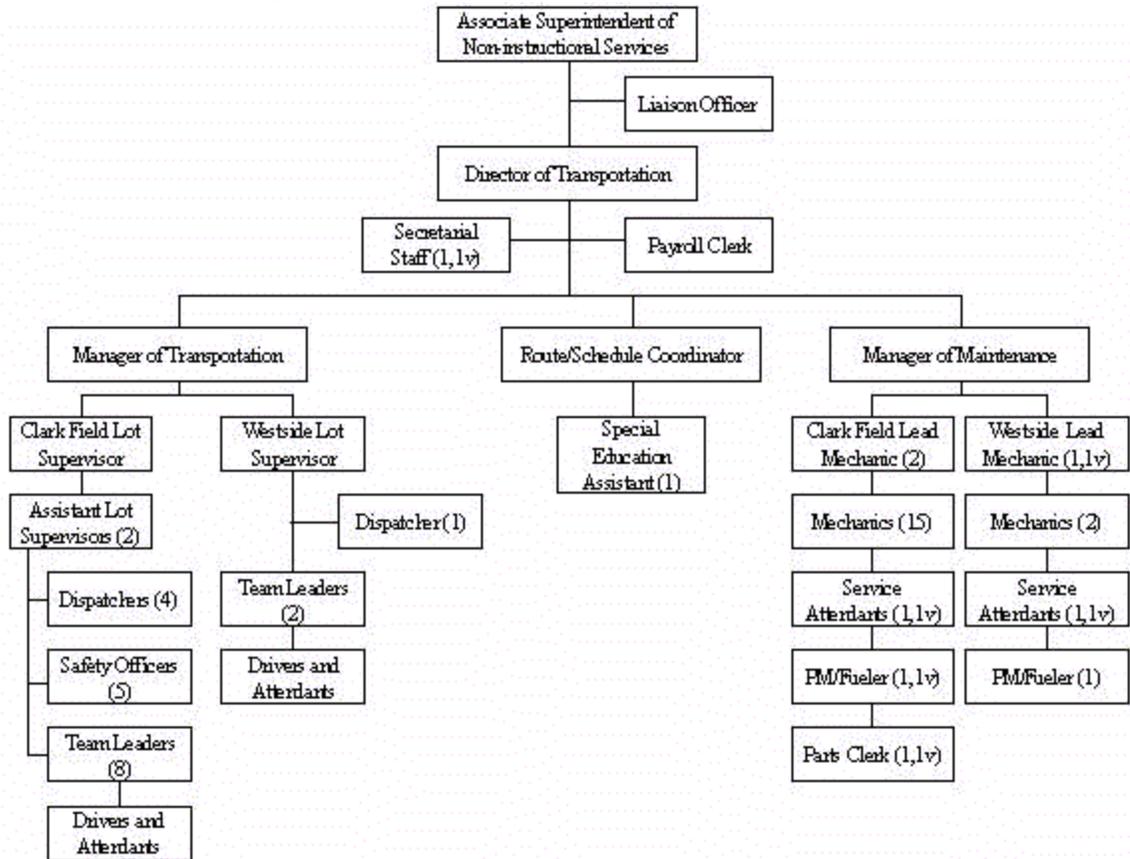
The route/schedule coordinator is responsible for planning and scheduling all regular and special education routes. The route/schedule coordinator has an assistant that schedules special education routes. Two drivers also assist part-time with routing and scheduling.

The Transportation Department is responsible for maintaining the school bus fleet only. The Facilities Department is responsible for maintaining the FWISD general services fleet (autos and trucks). The maintenance manager in the Transportation Department supervises all school bus maintenance at Clark Field and Westside. The FWISD budget has positions for four lead mechanics, 17 mechanics, four service attendants, three preventive maintenance servicers/fuelers and two parts clerks. Of the maintenance positions, five are vacant: one lead mechanic, two service attendants, one preventive maintenance servicer/fueler and one parts clerk.

Support staff for the Transportation Department includes a payroll clerk and two secretarial positions. One secretary position is vacant.

There are a total of 571 budgeted positions in the Transportation Department. Drivers also work part-time during mid-day to help with administrative functions. Drivers work part-time to record driver attendance, recruit and train new drivers and change videotapes on buses.

Exhibit 10-13 Transportation Department Organization



Source: FWISD Transportation Department.

FINDING

FWISD pays a competitive wage rate for school bus drivers. The minimum driver pay rate for operating a school bus route is \$11.41 per hour. The minimum pay rate for a bus attendant is \$7.64 per hour. In a focus group discussion with TSPR, drivers said the pay rate is the most positive aspect of the job. A FWISD position control report dated October 26, 2000 shows one driver position and two bus attendant positions were vacant in the Transportation Department.

Eighteen school districts and a regional transit agency in Tarrant County recruit bus drivers. A competitive driver salary is critical to attracting new drivers. **Exhibit 10-14** compares minimum, midpoint and maximum driver and attendant pay rates for FWISD and a group of school districts in Tarrant County. The pay rates for the Fort Worth Regional Transit Authority (the T) are also included. FWISD pay rates are higher than the peer group average.

**Exhibit 10-14
Driver and Attendant Pay Rates per Hour
2000-01**

District	Driver			Attendant		
	Minimum	Midpoint	Maximum	Minimum	Midpoint	Maximum
Lake Worth	\$11.00	\$12.25	\$13.00	\$7.00	\$8.50	\$11.00
Castleberry	\$10.85	\$10.85	\$10.85	\$9.76	\$9.76	\$9.76
Mansfield	\$11.25	\$13.16	\$15.07	\$7.96	\$9.95	\$11.94
Hurst-Eules-Bedford*	\$11.38	\$11.38	\$11.38	\$5.48	\$5.48	\$5.48
Arlington	\$10.50	\$12.23	\$14.66	\$8.32	\$10.14	\$12.13
The T	\$10.00	\$14.57	N/A	\$7.62	\$7.62	\$7.62
Peer Average	\$10.83	\$12.41	\$12.99	\$7.69	\$8.58	\$9.66
Fort Worth	\$11.41	\$14.05	\$16.86	\$7.64	\$9.55	\$11.46
Percent Different from Average	5%	13%	30%	-1%	11%	19%

Source: FWISD 2000-01 Compensation Plan and peer review.

**Drivers and monitors at Hurst-Eules-Bedford ISD are paid by the day. Daily rates have been divided by five, which is the guaranteed number of hours for FWISD drivers, to estimate hourly rates.*

The district has a history of regular increases in driver pay rates to stay competitive in the market. The minimum pay rate per hour for a driver increased by 27 percent from 1997-98 to 2000-01. From 1997-98 to 2000-01, the bus attendant wage rate per hour increased by 36 percent.

**Exhibit 10-15
Driver and Attendant Increases in Minimum Pay Rate per Hour
1997-98 to 2000-01**

Position	1997-98	1998-99	1999-2000	2000-2001	Percent Increase
Driver	\$8.97	\$9.24	\$9.99	\$11.41	27%
Bus Attendant	\$5.62	\$6.50	\$7.25	\$7.64	36%

Source: FWISD 1998-99 to 2000-01 Compensation Plans.

The driver pay rate is for assignments on school bus routes. Each driver is guaranteed five hours per day. Drivers may also accept assignments for field trips or other administrative duties. The driver pay rate for a field trip or other duties is \$8.25 per hour. The field trip rate has not changed since 1997-98.

COMMENDATION

The district regularly adjusts pay rates for school bus drivers and bus attendants to provide a competitive wage.

FINDING

Drivers and bus attendants in the Transportation Department are represented through an Employee Advisory Committee (EAC). The purpose of the EAC is to establish an orderly process for open communication between the management staff and the drivers and attendants. The EAC functions in an advisory capacity to solve common concerns and find procedures for effective communication. Eleven drivers (eight from Clark Field and three from Westside) and four attendants (three from Clark Field and one from Westside) are elected to the committee for two-year terms.

The district also has an employee liaison officer assigned to the Transportation Department. The liaison officer position was created in 1997 in response to concerns of a group of employees in the Transportation Department that the perspective of labor was not always considered in resolving issues. The employee liaison officer tries to help drivers and management see issues from each other's perspective by serving as an independent, unbiased mediator.

One of the liaison officer's duties is to work with the EAC. The officer's other duties include working with management to help employees resolve concerns relating to their employment; meeting with employees to hear concerns and disseminate information; observing employees in their physical work environments and making suggestions for improvements to working conditions; reviewing timecards and work schedules; and working with the public and schools to resolve concerns or complaints.

These duties are similar to those performed by a labor-relations representative.

The director of Transportation and the liaison officer said the employee liaison initiative has been successful as a tool to improve department communication, performance and morale.

COMMENDATION

The Employee Advisory Committee and the liaison officer represent initiatives to resolve problems and improve communication between transportation management and labor.

FINDING

The Transportation Department is actively involved in recruiting new drivers. The department formed a recruiting team, led by a safety officer and staffed by drivers, to recruit new drivers. The team visits Texas Workforce Commission offices, job fairs and other locations to recruit new drivers. Job candidates can learn about the job directly from a school bus driver. The safety officer immediately conducts interviews. The recruitment team in Transportation and the employment staff in Human Resources work closely together to expedite the steps to test and hire new driver candidates. Drivers are paid \$8.25 per hour for work on the recruitment team.

In August 2000, the *Fort Worth Star Telegram* reported that FWISD started the school year with a shortage of 45 to 50 relief drivers. Between August 1, 2000 and October 24, 2000, 87 drivers were recruited and entered in the driver training program. Of these drivers, 55 completed training and were still employed with FWISD as of October 2000. A FWISD position control report dated October 26, 2000, reported only one driver position and two bus attendant positions vacant.

COMMENDATION

The Transportation Department has a Recruitment Team to recruit new school bus drivers and expedite the procedures to hire qualified candidates.

FINDING

The organization of the Transportation Department does not include a section specifically dedicated to safety and training.

The Transportation Department has a training program operated by drivers. The driver training coordinator is a driver with part-time duties as the coordinator. The driver training coordinator drives a short route in the morning and afternoon and trains new drivers between routes. Six drivers work part-time as trainers to assist the driver training coordinator.

The Transportation Department employs five full-time safety officers. The safety officers maintain discipline on buses as needed, participate in parent/school conferences, investigate accidents, provide on-street supervision and interview new drivers. Each safety officer is assigned responsibility for specific schools in an area of the district. The safety officer is essentially a field supervisor. The ratio of drivers to safety officers is 86:1. In a TSPR report for Houston ISD, a peer group of national school districts had a driver to field supervisor ratio of 111:1.

The safety officer job description also includes duties for driver training, in-service training and evaluating drivers' ability to operate buses efficiently. The director of Transportation said the safety officers assist with 8-hour in-service training class before the start of each school year. A driver focus group said the safety officers were not involved in their initial driver training. One driver said the safety officers needed to provide some safety training to drivers.

Between June 1, 2000 and October 24, 2000, 135 drivers entered the training program (32 in June, 16 in July, 45 in August, 28 in September and 14 in October). There are more trainees in summer months because drivers are recruited for the new school year. Training includes up to 10 hours for classroom training and 20 hours per driver for behind-the-wheel training.

The Transportation Department implemented a system for one of the team leaders to record student infractions in a database. The Transportation Department can produce reports for specific schools and specific students. Procedures for review and analysis of these reports, however, are not fully implemented. The information from the student infraction database could be very useful in determining trends in student and driver behavior and tracking how schools respond to infractions. This information can also be used to help understand the nature of student discipline problems and develop specialized driver training modules to help handle these problems. For example:

- An individual student who consistently causes problems could warrant a parent conference.
- A general problem in discipline from a particular school might be resolved through a meeting with school administrators.

- A driver who has difficulties maintaining discipline may need student management training.
- Many drivers who cannot maintain discipline may result in a training program for all drivers that teaches student management skills.

Recommendation 100:

Establish a section within the Transportation Department dedicated to safety and training.

Safety is the most important aspect of student transportation, and safety can best be achieved with a comprehensive training program and well-trained drivers. Good training results in improved safety. An inadequately trained driver is a hazard, and a well-trained driver is an asset.

Implementing a driver-training program that emphasizes safety will create a secure environment to transport students.

Safety and training should be recognized as part of the formal organization of the Transportation Department. A safety/training supervisor should be created to report to the manager of Transportation. This position would be in charge of focusing on transportation safety, developing a curriculum for training and retraining, supervising training activities, supporting the recruitment team and overseeing the activities of the safety officers. The safety/training supervisor should also be responsible for tracking driver attendance, counseling those drivers with excessive absences and tracking drivers' availability to work route assignments. The seven drivers who train can continue to assist with training as needed. The safety/training supervisor should have skills in training and management.

The safety officers should report to the safety/training supervisor. One safety officer position can be eliminated to bring the driver-to-field supervisor ratio to 108:1, which is closer to the peer average. The safety officers' primary responsibilities should be training drivers and field supervision. The safety officers should monitor and evaluate driver performance through field supervision and work with the driver/trainers to provide effective retraining as needed. The drivers who help with training can continue to assist with training as needed, such as during the summer months when there is a higher volume of trainees or with behind-the-wheel training.

A clerk should be added to support the safety and training section. The clerk should be responsible for keeping records of driver training and retraining and tracking new driver certification. The clerk should also be responsible for collecting and tracking student infraction forms using the department's student infraction database. The clerk should be responsible

for collecting the forms each day from drivers, entering the forms in the database and entering the forms that are returned from school administrators. The clerk should perform periodic analysis of the data for the safety and training supervisor to reveal trends in infractions that can then be addressed appropriately either through retraining or a conference with parents and school administrators.

The clerk should also use the database as a mechanism for ensuring timely response by school administrators. Each week, the database can be queried to identify referrals that are pending. Pending items can be referred to the safety and training supervisor. The safety and training supervisor then can follow up with the appropriate school administrator to emphasize the importance of prompt action and communication with the student and the driver.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Transportation recommends eliminating one safety officer position and adding one safety and training supervisor position and one clerk position to the associate superintendent of Non-instructional Services and the director of Human Resources.	June 2001
2.	The associate superintendent of Non-instructional Services recommends to the superintendent and School Board to add one safety and training supervisor position and one clerk position to the Transportation Department	July 2001
3.	The superintendent authorizes the new positions.	July 2001
4.	The director of Human Resources establishes the new safety and training supervisor and clerk positions, job descriptions, a rate of pay and follows standard procedures for eliminating a safety officer position.	August 2001
5.	The director of Transportation Services hires a safety and training supervisor from a list of qualified candidates provided by the director of Human Resources.	November 2001

FISCAL IMPACT

One safety/training supervisor position is added. The position requires experience and skills in training and personnel management. The safety/training supervisor is at the same grade as the lot supervisor position, which has a midpoint wage rate of \$18.18 per hour. For a 260-day year, the new position will cost \$43,210 per year (260 days x 8 hours x [\$18.18 per hour + 9.35 percent payroll benefit] + \$1,860 per year health benefit).

One safety officer position is eliminated. The safety officer has a midpoint wage rate of \$15.98 per hour. For a 260-day year, eliminating this position will save \$38,206 per year (260 days x 8 hours x [\$15.98 per hour + 9.35 percent payroll benefit] + \$1,860 per year health benefit).

One clerk position is added. Several different pay grades exist for clerks. The data clerk has a midpoint wage rate of \$109.79 per day. For a 240-day year, the new position will cost \$30,673 per year (240 days x [\$109.79 per day + 9.35 percent payroll benefit] + \$1,860 per year health benefit).

Overall, this recommendation will cost \$35,677 per year (\$43,210 - \$38,206 + \$30,673).

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Establish a section within the Transportation Department dedicated to safety and training.	(\$35,677)	(\$35,677)	(\$35,677)	(\$35,677)	(\$35,677)

FINDING

The Transportation Department does not have full-time dispatchers. Five drivers are assigned dispatcher duties. When there are not enough drivers for all routes, the dispatchers must drive a route, and other administrative personnel must dispatch. During the TSPR review, one of the assistant lot supervisors was observed dispatching during an afternoon run.

Dispatch operations are located at both Clark Field and Westside. The purpose of dispatch is to manage operations on the street through continuous radio communication with each driver. At most public transit agencies, the use of radios allows dispatch operations to occur for the entire agency from one centralized facility. All FWISD buses have radios and can communicate with either Clark Field or Westside at any time.

A survey of principals revealed that 48 percent did not feel that buses arrive and leave on time. Many of the comments received from teacher/principal focus groups and public forums about transportation concerned on-time performance.

Dispatch is a vital function of the Transportation Department. Without qualified and trained dispatchers and without adequate dispatch procedures, communication between supervisors and drivers can break down. Such breakdowns can result in delays and can ultimately compromise student safety in the event of an accident.

The ratio of school buses to dispatchers may vary among school districts. In the Killeen ISD, one AM and one PM dispatcher monitor 160 buses each morning and evening. In the San Antonio ISD, one AM and one PM dispatcher monitor 140 buses each morning and evening. FWISD operates over 350 buses each morning and evening. The FWISD level of service requires two AM and two PM dispatchers to provide dispatcher supervision comparable to Killeen ISD and San Antonio ISD.

At FWISD, each driver is paid for five hours per day for driving a bus. Each driver, therefore, can work up to three more hours each day without accruing overtime. TSPR assumes each of the five FWISD drivers have earned pay for three additional hours per day to dispatch. Drivers that perform duties other than driving are paid at a rate of \$8.25 per hour plus 26.55 percent payroll benefits.

Recommendation 101:

Create two full-time and one part-time dispatcher positions at the Clark Field facility.

The Transportation Department should create two full-time and one part-time dispatch positions that are responsible for tracking route schedules to ensure on-time performance and reporting to school administrators immediately when a bus is running late. These dispatchers also should track on-time performance and report problems to the routing and scheduling section to verify the reasonableness of schedules and report problems to the safety and training supervisor.

To achieve a dispatcher-to-bus ratio similar to Killeen ISD and San Antonio ISD, two full-time dispatchers and one part-time dispatcher working on a split shift should be on duty at all times during morning and afternoon operations. During the school year, one dispatcher should work from 6:00 a.m. to 2:00 p.m., and one dispatcher should work from 10:00 a.m. to 6:00 p.m. The part-time dispatcher should work a split shift from 6:00 a.m. to 10:00 a.m. and 2:00 p.m. to 6:00 p.m. During the summer, only one dispatcher needs to be on duty at all times because fewer buses are on the road. The full-time dispatchers should work year-round, and the part-time dispatcher should work during the school year.

The dispatch function at the Westside lot should be eliminated because all FWISD buses have radios and can communicate with Clark Field.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Transportation recommends eliminating the dispatch function and five part-time driver/dispatcher positions	June 2001
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	at the Westside lot to the superintendent and board.	
2.	The board approves the elimination of the positions.	June 2001
3.	The director of Transportation recommends adding three dispatcher positions to the associate superintendent of Non-instructional Services and the director of Human Resources.	June 2001
4.	The associate superintendent of Non-instructional Services recommends adding three dispatcher positions to the superintendent and school board.	July 2001
5.	The superintendent authorizes the new positions.	July 2001
6.	The director of Human Resources establishes the new dispatcher positions, job descriptions and a rate of pay.	August 2001
7.	The director of Human Resources provides the director of Transportation Services a list of qualified candidates for the dispatcher positions.	November 2001

FISCAL IMPACT

Eliminating the five part-time driver/dispatchers will save 3,900 hours (a 260-day year is assumed at three hours per day for each of five part-time driver/dispatchers). The savings will be \$40,717 per year (3,900 annual hours x [\$8.25 per hour for drivers who have dispatching duties + 26.55 percent payroll benefits]). The health benefits are not saved because the driver positions are not eliminated.

A dispatcher position is not included in the FWISD compensation plan. In Mansfield ISD, however, dispatchers are paid at the same grade as drivers. Two full-time dispatcher positions at eight hours each day for a 260-day year will result in 4,160 hours per year. One part-time dispatcher at eight hours each day for a 180-day year will result in 1,440 hours per year. The total for three dispatchers is 5,600 hours per year.

The midpoint of the pay range for a driver who will be eligible to apply to be a dispatcher is \$14.05. Since dispatchers will not be driving a school bus, their payroll benefits will be 9.35 percent plus \$1,860 per year health benefit. Creating these new positions will cost \$91,617 per year (5,600 hours x [\$14.05 per hour + 9.35 percent payroll benefits] + [\$1,860 health benefits x 3 dispatchers]).

Overall, this recommendation will cost \$50,900 per year (\$91,617 - \$40,717). Three-fourths of this cost is claimed in the first year.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
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Create two full-time and one part-time dispatcher positions at the Clark Field facility.	(\$38,175)	(\$50,900)	(\$50,900)	(\$50,900)	(\$50,900)
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Chapter 10

STUDENT TRANSPORTATION

A. Organization and Staffing (Part 2)

FINDING

The Transportation Department does not have enough experienced and trained staff to handle routing and scheduling.

The department operates 353 regular and special education routes plus field trips with two full time routing and scheduling staff. The route/schedule coordinator assumes primary responsibility for all regular routing and scheduling. The coordinator has one assistant responsible for special education routing and scheduling. Due to the nature of special education routes, the routes and student records change daily. The routing and scheduling assistant makes these changes and updates to the student records each day. Two drivers assist with routing and scheduling on a part-time basis. Austin ISD operates approximately 330 routes and has five schedulers/coordinators for regular education and special education routes and special trips (field trips).

The FWISD Transportation Department installed new automated routing and scheduling software for the 2000-2001 school year. Implementation of the software did not go smoothly and caused many routing and scheduling problems. The software can automate and support routing and scheduling, but the software's benefits cannot be fully realized if insufficiently trained staff members are unavailable to operate the system and resolve problems.

A field trip coordinator is not included in the official organization of the department. An assistant lot supervisor is responsible for coordinating field trips in addition to other supervisory duties. Based on a one week sample of field trip data for October 2000, between six and 96 field trips were operated each day, for an average of 54 field trips per day.

Recommendation 102:

Provide an appropriate number of employees for routing and scheduling in the Transportation Department.

Skilled professionals are required to plan and schedule effective and efficient school bus routes and to maximize the capabilities of the new automated routing and scheduling software.

A routing/scheduling manager position should be created to oversee routing and scheduling and to supervise routing and scheduling staff. An additional route coordinator for special education is needed. Due to the number of changes to special education routes, two positions for special education routes are warranted. A clerk position should be added to the section so the special education route coordinators can focus on designing effective and efficient routes and not filing and updating route changes and student records.

With an average of 54 field trips per day, a dedicated field trip coordinator position is warranted. The field trip coordinator should be responsible for scheduling all field trips, assigning field trips to drivers and handling all phone calls relating to field trip complaints and concerns. A separate field trip coordinator will allow the assistant lot supervisor to focus on the position's primary duties.

Due to this new staff, drivers will no longer be required to assist with routing and scheduling.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Transportation recommends to the associate superintendent of Non-instructional Services and the director of Human Resources adding a manager of routing and scheduling, a routing and scheduling coordinator for special education, a field trip coordinator and a scheduling clerk.	June 2001
2.	The associate superintendent of Non-instructional Services recommends to the superintendent and School Board adding a manager of routing and scheduling, a routing and scheduling coordinator for special education, a field trip coordinator and a scheduling clerk to the Transportation Department.	July 2001
3.	The board authorizes the new positions.	July 2001
4.	The director of Human Resources establishes the new positions, job descriptions and rates of pay.	August 2001
5.	The director of Human Resources provides the director of Transportation Services a list of qualified candidates for the positions.	November 2001

FISCAL IMPACT

The route/schedule manager should be higher than the pay grade of the router/scheduler coordinator, but not as high as the manager of Transportation. The FWISD manager of Transportation has a midpoint wage rate of \$265.71 per day. The route/schedule coordinator has a

midpoint wage rate of \$168.75 per day. Pay Grade 2 is between these two positions with a midpoint wage rate of \$197.44 per day. The annual cost of the route/schedule manager will be \$53,676 (240 days x [\$197.44 per day + 9.35 percent payroll benefits] + \$1,860 health benefit).

The route/schedule coordinator for special education and the field trip coordinator should be at the same pay grade as the existing route/schedule coordinator for regular education. This pay grade has a midpoint wage rate of \$168.75 per day for an annual cost of \$92,293 (240 days x 2 positions x [\$168.75 per day + 9.35 percent payroll benefits] + [\$1,860 health benefits x 2 positions]).

Several different pay grades exist for clerks. One pay grade includes data clerks, which is applicable for the new clerk position recommended. The clerk has a midpoint wage rate of \$109.79 per day for an annual cost of \$30,673 (240 days x [\$109.79 per day + 9.35 percent payroll benefits] + \$1,860 health benefits).

Two drivers will no longer need to assist the routing and scheduling area, which saves 1,560 hours (260 days x 3 hours a day x 2 drivers) and \$16,287 per year (1,560 hours x [\$8.25 per hour + 26.55 percent payroll benefits]). Since the driver positions are not eliminated completely, the health benefit of \$1,860 per year per position is not included in this savings.

Overall, this recommendation will cost \$160,355 per year (\$53,676+\$92,293+\$30,673-\$16,287). Three-fourths of this cost is claimed in the first year.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Provide an appropriate number of employees for routing and scheduling in the Transportation Department.	(\$120,266)	(\$160,355)	(\$160,355)	(\$160,355)	(\$160,355)

FINDING

The Transportation Department's school bus-to-mechanic ratio is lower than industry standards recommend. The manager of Maintenance targets a ratio of 17 vehicles per mechanic. However, industry standards typically

recommend between 20 and 30 vehicles per mechanic, depending on the fleet mix and the number of miles each vehicle is operating.

The maintenance area has budgeted positions for 17 mechanics and four lead mechanics for 380 vehicles. Four service attendants also assist with vehicle maintenance. Two of these service attendant positions are vacant. The vacancies have not reduced the quality of vehicle maintenance.

The Transportation Department is receiving 161 new buses this year and is planning to convert its entire fleet to air-conditioned buses. This large purchase of new buses and the conversion to an air-conditioned fleet affect the vehicle-to-mechanic ratio. First, the added component of air conditioning will require additional maintenance hours per vehicle. Second, the large purchase of buses will result in "fleet campaigns." Fleet campaigns occur when all buses of a similar age and make develop the same problem at the same time. Fleet campaigns are a typical problem in maintenance shops.

Recommendation 103:

Establish a target of 23 school buses per mechanic.

The manager of Maintenance should increase the target of vehicles to mechanics to 23:1. A ratio at the lower end of the industry standard range is recommended due to fleet campaigns that will result from the 161 new buses and the conversion to an air-conditioned fleet requiring additional maintenance. To achieve this ratio, four mechanic positions should be eliminated.

One of the vacant service attendant positions should be eliminated.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Transportation recommends eliminating four mechanic positions and one service attendant position to the superintendent and board.	June 2001
2.	The board approves the elimination of four mechanic positions and one service attendant position.	June 2001
3.	The superintendent directs the director of Human Resources to follow the standard procedures for eliminating mechanic and service attendant positions.	July 2001

FISCAL IMPACT

The midpoint wage rate for a master mechanic is \$18.18 per hour. For a 260-day year, eliminating these four positions will save \$195,347 per year (260 days x 8 hours per day x 4 mechanics x [\$18.18 per hour + 24.23 percent payroll benefit] + (\$1,860 per year health benefit x 4 mechanics).

The service attendant midpoint wage rate is \$10.86 per hour. For a 260-day year, eliminating this position will save \$29,922 per year (260 days x 8 hours per day x [\$10.86 + 24.23 percent payroll benefit] + \$1,860 per year health benefit).

Overall, this recommendation will save \$225,269 per year (\$195,347 + \$29,922).

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Establish a target of 23 buses per mechanic and eliminate four mechanic and one service attendant positions.	\$225,269	\$225,269	\$225,269	\$225,269	\$225,269

FINDING

The Transportation Department does not have performance measures or standards, or regular performance monitoring. The department does not use benchmarks to measure accomplishments or identify areas needing improvement. Many public transit agencies and private fleet managers use performance measures to determine the level of training that employees need; enhance preventive maintenance programs to reduce repeat failures, road calls and unscheduled maintenance; improve employee and customer satisfaction; and reduce costs.

The Transportation Department also does not have a standard for on-time performance and does not track records to determine how many buses arrive early or late at schools or for field trips. Many of the comments on transportation received from teacher/principal focus groups and public forums concerned on-time performance. A survey of principals by TSPR reported that almost 50 percent of respondents were dissatisfied with the Transportation Department's on-time performance.

Exhibit 10-16 shows some standard transportation performance indicators and FWISD performance statistics for each performance indicator.

Exhibit 10-16 Transportation Performance Indicators and FWISD Performance Statistics

Performance Indicator	FWISD 1998-99 Actual
Safety Accidents or incidents per 100,000 miles Student referrals per 1,000 students bused Annual hours of professional training for each driver	Not Tracked Not Tracked Not Provided
Cost-Efficiency Operations cost per mile - Regular Operations cost per mile - Special Operations cost per hour - Regular Operations cost per hour - Special	\$2.27 \$2.22 Not Tracked Not Tracked
Cost-Effectiveness Operations cost per rider - Regular Operations cost per rider - Special	\$3.53 \$16.14
Service Effectiveness Route riders per mile - Regular Route riders per mile - Special Route riders per bus - Regular Route riders per bus - Special	0.64 0.14 50 12
Service Quality On-time performance Complaints per 100,000 miles Routes with trips longer than 1.25 hours - Regular Routes with trips longer than 1.25 hours - Special	Not Tracked Not Tracked 29%* 32%*
Maintenance Performance Miles between road calls or breakdowns Percent PMs completed on-time Turnover time per bus repair Spare ratio Annual hours professional training for each mechanic	7,926* Not Tracked Not Tracked Not Tracked Not Provided
Personnel Management Number of route driver positions vacant Number of attendant positions vacant Absentee rate for drivers and attendants Number of available relief drivers Percent overtime Annual turnover rate	Not Tracked Not Tracked Not Tracked Not Tracked Not Tracked Not Tracked

Source: TEA School Transportation Operation Report 1998-99; TEA School Transportation Route Services Report 1998-99; operations cost

*excludes capital outlay and debt service; FWISD Transportation Department Special Education Route Lengths report, October 23,2000; FWISD Transportation Department regular route descriptions; FWISD manager of maintenance estimates on number road calls per year.
Indicates data more recent than 1998-99 was used.

Recommendation 104:

Implement a performance-monitoring program to measure accomplishments and identify areas for improvement.

After analysis of data provided by FWISD, the following performance measures are recommended to monitor cost effectiveness, cost efficiency, service effectiveness and service quality/safety.

**Exhibit 10-17
Recommended FWISD Performance Measures**

Performance Indicator	FWISD 1998-99 Actual	Target
Safety		
Accidents per 100,000 miles	Not Tracked	0.21
Student referrals per 1,000 students bused	Not Tracked	1
Annual hours of professional training for each driver	Not Provided	8 hours
Cost-Efficiency		
Operations cost per mile - Regular	\$2.27	\$2.04
Operations cost per mile - Special	\$2.22	\$2.00
Operations cost per hour - Regular	Not Tracked	\$30.60
Operations cost per hour - Special	Not Tracked	\$30.00
Cost-Effectiveness		
Operations cost per rider - Regular	\$3.53	\$3.18
Operations cost per rider - Special	\$16.14	\$14.53
Service Effectiveness		
Route riders per mile - Regular	0.64	0.70
Route riders per mile - Special	0.14	0.15
Route riders per bus - Regular	50	55
Route riders per bus - Special	12	14
Service Quality		
On-time performance	Not Tracked	95.0%
Complaints per 100,000 miles	Not Tracked	30
Routes with trips longer than 1.25 hours - Regular	29%*	25.0%
Routes with trips longer than 1.25 hours - Special	32%*	10.0%

Maintenance Performance		
Miles between road calls or breakdowns	7,926*	8,700
Percent PMs completed on-time	Not Tracked	95.0%
Turnover time per bus repair	Not Tracked	6 hours
Spare ratio	Not Tracked	15.0%
Annual hours professional training for each mechanic	Not Tracked	16 hours
Personnel		
Number of route driver positions vacant	Not Tracked	0
Number of attendant positions vacant	Not Tracked	0
Absentee rate for drivers and attendants	Not Tracked	6.0%
Number of available relief drivers	Not Tracked	52
Percent overtime		
Drivers	Not Tracked	8%
Mechanics	Not Tracked	5%
Administration	Not Tracked	3%
Annual turnover rate	Not Tracked	20.0%

*Source: TEA School Transportation Operation Report 1998-99; TEA School Transportation Route Services Report 1998-99; operations cost excludes capital outlay and debt service; FWISD Transportation Department Special Education Route Lengths report, October 23, 2000; FWISD Transportation Department regular route descriptions; FWISD manager of maintenance estimates on number road calls per year.
Indicates data more recent than 1998-99 was used.

Targets have been selected based on levels that should be achievable in light of available information and the experience of other school districts and fleet operators. Once the FWISD experience is measured, the targets may need to be adjusted.

Performance statistics should be tracked on a monthly basis and the results shared with department staff to encourage performance improvements.

The results should be communicated to school administrators so they know the Transportation Department has set goals for service quality.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Transportation adopts key indicators to assess the department's performance; the indicators and targets are communicated to the Transportation staff and school and school administrators.	June 2001
2.	The director of Transportation monitors the performance indicators and disseminates the results to all Transportation personnel and school administrators.	Monthly
3.	The director of Transportation annually adjusts performance targets to reflect experience.	Annually

FISCAL IMPACT

The recommendation can be implemented with existing resources.

FINDING

Drivers and attendants do not follow a dress code to ensure a professional appearance. Some drivers choose to wear uniforms but are responsible for purchasing their own uniforms. Food service personnel receive a \$7.00 uniform stipend per month.

While a driver's dress may not directly affect performance, appearance does affect students' perception of drivers' professionalism. During focus group discussions and interviews, principals and school administrators reported a concern about the lack of respect for personnel in the Transportation Department. If a driver's appearance is not professional, there is greater risk students will not treat drivers with respect, which can add to student discipline and management problems.

Tomball ISD, Magnolia ISD and Pasadena ISD require drivers to wear uniforms. Tomball ISD rents knit polo shirts and requires drivers to purchase khaki pants or walking shorts. Tomball ISD pays a contractor \$6.42 per driver per week for 42 weeks to provide, launder and replace the uniform shirts. Magnolia ISD rents knit polo shirts and khaki pants for drivers. Magnolia ISD pays a contractor a \$3.50 set-up fee for each driver, plus \$3.75 per driver per week for providing, laundering and replacing uniforms.

Pasadena ISD purchases five polo or oxford shirts for each new driver, then purchases one new shirt each year per driver. The shirts cost \$21.50 each. The drivers have the choice of five different colors of shirts and provide their own pants. When drivers leave the district, they return the shirts; shirts that are in good condition are laundered and reused as replacements for worn out shirts. Representatives interviewed at these districts like the uniforms because drivers are easily recognizable by

district students and staff, and drivers have a professional appearance. At Tomball ISD, the district representative said the uniforms make the drivers feel and act more professional.

Recommendation 105:

Provide drivers and attendants a sensible, comfortable uniform.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Transportation develops a policy on driver and attendant uniforms.	June 2001
2.	The director of Transportation recommends to the associate superintendent of Non-instructional Services a program for driver and attendant uniforms.	July 2001
3.	The associate superintendent of Non-instructional Services recommends to the school board that the Transportation Department receive funds for uniforms.	July 2001
4.	The superintendent approves the request.	July 2001
5.	Uniforms are provided to each driver and attendant.	Ongoing and annually

FISCAL IMPACT

The initial set up fee for 415 drivers and 98 attendants will be \$55,148 (513 drivers and attendants x 5 shirts x \$21.50). For each additional year, FWISD will purchase five shirts for each new driver and attendant and three new shirts for all other drivers and attendants. Assuming that 18 new drivers and attendants begin work per month, or 216 drivers and attendants per year, five new shirts for each will cost \$23,220 per year (216 new drivers and attendants x 5 shirts x \$21.50). For the remaining 297 drivers and attendants, three new shirts per year will cost \$19,157 (297 existing drivers and attendants x 3 shirts x \$21.50). The annual total for uniforms after the first year will be \$42,377.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Provide drivers and attendants a sensible, comfortable uniform.	(\$55,148)	(\$42,377)	(\$42,377)	(\$42,377)	(\$42,377)

Chapter 10

STUDENT TRANSPORTATION

B. Routing and Scheduling

The Transportation Department operates approximately 225 buses on regular routes and 128 buses on special education routes to 108 schools each morning and afternoon. Many of these buses operate on routes with multiple runs in the morning and afternoon. The district does not operate on staggered bell times, but the Transportation Department negotiates bell times with the principals of individual schools as needed.

The Transportation Department provides several types of routes, including regular, special education, special programs, alternative schools, bilingual education, midday and after school program (tutoring) routes. The department also provides field trips to schools and organizations. Field trip sponsors can request field trips from their schools electronically using field trip software developed by the district.

FINDING

The Transportation Department has not used the automated routing and scheduling system to optimize regular education routes and schedules and improve cost efficiency.

The district implemented the new routing and scheduling program by EDGAR, Inc., for the 2000-2001 school year. FWISD issued a request for proposals for a new routing and scheduling system in January 2000. Qualified proposals were received from Edulog and EDGAR. The Transportation Department performed a cost-benefit analysis for the two proposals. Although the EDGAR annual license fee was higher than Edulog, the director of Transportation said the added services included in the EDGAR license fee benefit the department. Some of these services include updating the FWISD master street arterial network map, updating the system program, making reasonable software modifications, providing personnel training and providing assistance in system operations. The annual license fee is \$45 per special education student transported. The EDGAR, Inc., proposal states implementation of the EDGAR software will result in "...a direct savings of 15+ percent in total transport time...this will generate an 8+ percent reduction in FWISD total transport cost."

The cost to FWISD to implement EDGAR was \$101,000, which included \$83,000 in professional consulting services and \$18,000 in direct expenses for an eight-month installation and implementation period. EDGAR personnel are assigned to FWISD for the entire installation and

implementation period. During this period, EDGAR, Inc., is responsible for providing initial and continuous training to FWISD personnel; assembling and correcting data for regular and special education students and using the data to develop run reports and driver assignments; and developing interfaces from the EDGAR system to the Transportation Department's field trip and timekeeping software systems.

The Transportation Department did not have a plan to transition from the previous routing and scheduling system to EDGAR. As a result, implementation of EDGAR did not go smoothly. The information from the previous routing and scheduling system was not compatible with EDGAR, so routes had to be created from scratch. In addition, the geographical information system used with the routing and scheduling system is not accurate. The regular transportation routes continue to require modification and revision. The software supplier has one clerical person in Transportation to help the staff.

Other circumstances at the beginning of the school year created additional routing and scheduling problems. There were not enough buses because new buses did not arrive as expected, and there was an unexpected increase in the number of school buses required. There were not enough drivers to meet the additional requirements. The Transportation Department was not informed in a timely manner of several new school openings. The adjustments for last minute school changes were difficult to make, in part because of the new routing and scheduling system.

The problems experienced at the beginning of the 2000-2001 school year were extreme, but by October 2000, many of the routing and scheduling problems had been corrected.

The route/schedule coordinator has not received sufficient training for EDGAR. TSPR observed that route/schedule coordinator did not know the purpose of some of the menu items in the EDGAR program. The route/schedule coordinator said she would receive more training in December 2000 or January 2001. The director of Transportation said this training did not occur.

Twenty-two school bus routes were added for 2000-01, requiring an equal number of additional buses and drivers. The additional routes represent a 7-percent increase in buses needed for peak service.

Recommendation 106:

Use the routing and scheduling software to plan more efficient regular education routes to reduce the number of required school buses and drivers.

The Transportation Department should use the new routing and scheduling software to improve the design of routes and schedules to increase riders per mile and to reduce the number of routes required. The Transportation Department should also closely monitor the EDGAR commitment to an 8-percent reduction in operations cost.

Before a program of routing and scheduling analysis can occur, staff must be adequately trained to use EDGAR. The Transportation Department should make in-depth training for the routing and scheduling staff a priority and schedule training as soon as possible.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Transportation schedules comprehensive training in EDGAR for the route/schedule coordinator and the assistant for special education routes.	June 2001
2.	The route/schedule coordinator and the assistant for special education routes receive comprehensive training.	July 2001
3.	As new routing and scheduling staff is hired, the director of Transportation schedules the staff for training in EDGAR.	As needed
4.	Once new staff is hired and trained, the route and schedule manager develops a plan for analyzing routes and schedules for efficiencies.	December 2001
5.	The route and schedule manager implements the plan for analyzing routes and schedules for efficiencies.	January 2002
6.	The regular route coordinator evaluates routes for efficiencies and modifies routes as needed.	Monthly

FISCAL IMPACT

A savings of 8 percent of 1998-99 base year operations cost of \$7,493,781 is \$599,502. Training is included in the maintenance fee and can be provided within existing resources. Since the analysis of routes and schedules for efficiencies will not be complete until January 2002, savings in the first year are 4 percent, or \$299,751.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Use the routing and scheduling software to plan more efficient regular education routes to reduce the number of required	\$299,751	\$599,502	\$599,502	\$599,502	\$599,502

school buses and drivers.					
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FINDING

The Transportation Department has not implemented the automated routing and scheduling system for special education routes. As illustrated in **Exhibit 10-18**, the FWISD cost for special education transportation is higher than the peer average.

Exhibit 10-18
Special Education Transportation Cost Indicators
For FWISD and Peer Districts
1998-99

District	Total Cost/ Odometer Mile	Total Cost/ Rider
Dallas County	\$1.99	\$11.76
El Paso	\$2.29	\$13.17
Austin	\$2.17	\$14.29
Houston	\$1.09	\$2.67
Peer Average	\$1.88	\$10.47
Peer Average without Houston	\$2.15	\$13.07
Fort Worth	\$2.22	\$19.71
Percent Different from Average without Houston	3%	51%

Source: TEA School Transportation Operation Report and School Transportation Route Services Report 1998-99.

Houston ISD costs are low compared to the other peers and are not typical of special education costs. The peer average is calculated with and without Houston for comparisons. The FWISD cost per mile is 3 percent higher than the peer average without Houston ISD. The FWISD cost per rider is 51 percent higher than the peer average without Houston ISD.

Exhibit 10-19 illustrates transportation costs for special education route miles only (excludes miles for field trips and deadhead miles). The cost for route miles is calculated by multiplying the cost per odometer mile by route miles. The cost per rider is calculated by dividing costs for route miles by the number of special education riders.

Exhibit 10-19
Special Education Transportation Cost Indicators for Route Miles
Only
For FWISD and Peer Districts
1998-99

	Cost per Odometer Mile	Route Miles	Cost for Route Miles	Special Education Riders	Cost per Rider
Dallas County	\$1.99	6,355,452	\$12,647,209	1,083,960	\$11.67
El Paso	\$2.29	1,009,826	\$2,312,663	329,940	\$7.01
Austin	\$2.17	1,859,784	\$4,034,733	418,140	\$9.65
Houston	\$1.09	5,293,044	\$5,765,364	3,348,900	\$1.72
Peer Average	\$1.88	3,629,527	\$6,189,992	1,295,235	\$7.51
Peer Average without Houston	\$2.15	3,075,021	\$6,331,535	610,680	\$9.44
Fort Worth	\$2.22	1,520,191	\$3,378,966	244,080	\$13.84
Percent Different from Average without Houston	3%	-51%	-47%	-60%	47%

Source: TEA School Transportation Operation Report and School Transportation Route Services Report, 1998-99; operations cost exclude capital outlay and debt service.

The FWISD cost per special education rider per route miles is 47 percent higher than the peer average without Houston ISD.

Special education riders per route mile and the average number of route miles per special education rider are shown in **Exhibit 10-20**.

Exhibit 10-20
Special Education Transportation Service Effectiveness Indicators
For FWISD and Peer Districts
1998-99

District	Riders/ Route Mile	Route Miles/Special Education Rider
Dallas County	0.17	5.86
El Paso	0.33	3.06
Austin	0.22	4.45
Houston	0.63	1.58
Peer Average	0.34	3.74
Peer Average without Houston	0.24	4.46
Fort Worth	0.16	6.23
Percent Different from Average without Houston	-33%	40%

Source: TEA School Transportation Operation Report and School Transportation Route Services Report, 1998-99; operations cost exclude capital outlay and debt service.

The average distance traveled by special education riders is 40 percent higher for FWISD than peer districts. This compares to a 47 percent higher cost for special education riders. The FWISD miles per special education rider is 6 percent higher than Dallas County Schools. The FWISD cost per special education rider is 19 percent higher than Dallas County Schools.

As shown in **Exhibit 10-21**, FWISD operations cost for special education increased 13 percent between 1997-98 and 1998-99. During the same time period, the number of special education riders decreased 24 percent and odometer miles decreased 6 percent.

**Exhibit 10-21
FWISD Special Education Costs, Riders, and Miles
1997-98 to 1998-99**

Category	1997-98	1998-99	Percent Increase
Special Education Cost	\$4,267,252	\$4,810,814	13%
Special Education Riders	321,660	244,080	-24%
Special Education Odometer Miles	2,294,405	2,164,377	-6%

Source: TEA School Transportation Operation Report and School Transportation Route Services Report, 1998-99; operations cost exclude capital outlay and debt service.

The director of Transportation said FWISD special education transportation cost is high because of the cost of training for drivers. In 1998-99, special education drivers were provided 487 hours of training for the care of special needs children. FWISD Health Services provided the training. The cost of the drivers' time in training was \$5,951.

The director of Transportation said special education transportation cost is also high because special education riders are transported to schools other than their home schools. TSPR contacted peer districts to identify how peers manage special education transportation. The AISD Transportation director said Austin ISD works with their Special Education Department to have as many students as possible attend their home school or an adjacent school. The director said routing and scheduling staff work closely with special education coordinators. A Houston ISD representative said the Transportation Department discusses with the Special Education Department the best alternative to provide program needs and provide transportation to special education students. The representative estimated that roughly a third of special education students attend their home school.

Two ways to manage special education transportation costs are by working with the Special Education Department to encourage placement of students in their home schools and by efficient and effective routing and scheduling. The Houston ISD representative credited the experienced routing and scheduling staff and their automated routing and scheduling software for planning efficient and effective routes. Automated routing and scheduling software can help link individual trips to create more efficient service.

Recommendation 107:

Implement the routing and scheduling software for special education.

Implement EDGAR for special education transportation. Special education routes change daily and an automated routing and scheduling system is designed to simplify route changes and to be more efficient than manual routing and scheduling.

Implementation should begin immediately. To avoid the same problems experienced for the regular transportation routes, a transition plan to move from manual to automated procedures should be developed to ensure a

smooth implementation. Using EDGAR for special education should achieve the 8-percent reduction in cost promised in the EDGAR proposal.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Transportation and the route/schedule coordinator develop a formal policy limiting special education trips to 1 hour and 15 minutes.	June 2001
2.	After all staff is trained and new routing and scheduling staff is hired, the route and schedule manager begins implementing EDGAR for special education routes.	January 2002
3.	Implementation of EDGAR for special education is complete.	April 2002
4.	The route and schedule coordinators for special education begin using EDGAR to plan and schedule special education routes.	April 2002

FISCAL IMPACT

A savings of 8 percent of 1998-99 base year operations cost for special education of \$4,810,814 is \$384,865. Since EDGAR is not implemented for special education transportation until April 2002, the savings for the first year is estimated as 1 percent of cost, or \$48,108.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Implement the routing and scheduling software for special education.	\$48,108	\$384,865	\$384,865	\$384,865	\$384,865

Chapter 10

STUDENT TRANSPORTATION

C. Training and Safety

The Transportation Department has a training program operated by drivers. The driver training coordinator is a driver with part-time duties as the coordinator. Six drivers work part-time as trainers to assist the driver training coordinator.

The Transportation Department employs five full-time safety officers. The safety officer job description also includes duties for driver training, in-service training and evaluating drivers' ability to operate buses efficiently.

FINDING

All FWISD buses have cameras. Transportation has a program for regular maintenance of the cameras. Tapes are rotated regularly, and used tapes are stored for 20 days for reference. The liaison officer oversees the rotation and storage of tapes. Both Clark Field and Westside have well-organized storage rooms for housing the tapes.

The cameras are popular with the drivers, team leaders and the liaison officer. During TSPR interviews, staff said they like the cameras because they help to control student discipline, provide a mechanism for drivers to defend themselves if they are accused of inappropriate behavior and provide proof to principals and parents when a student misbehaves. During driver and team leader focus groups, the cameras were credited with helping control and resolve many student discipline problems.

The cameras cost \$845 each, including camera, lock-box and wiring harness assembly. Ten drivers work part-time to rotate and shelve tapes.

COMMENDATION

The Transportation Department uses cameras to record student behavior on buses and assist in managing student behavior.

FINDING

The Transportation Department does not have a program for continuing professional training for drivers. The curriculum for new drivers is not consistent with recommendations of the Texas Department of Public Safety.

Experienced drivers receive retraining if they are involved in an accident. Driver retraining after an accident includes classroom and behind-the-wheel training. All FWISD school bus drivers attend eight hours of in-service training each year either in the summer or in the fall. The director of Transportation said she analyzes causes of accidents during the previous year and focuses training during in-service on addressing those problems.

Other school districts provide a program of continuing professional driver training. The Martin County, Florida school district provides 16 hours of professional driver training per year per driver and sponsors a monthly safety meeting with drivers. Drivers are also scheduled for an annual ride check with a lead driver to evaluate performance and student management techniques.

During driver focus groups, some FWISD drivers felt more safety training could be provided. One driver said additional training every few years could be helpful. The drivers also said that if they were to request and receive additional training, they would not be compensated for their time. In Round Rock ISD, drivers are provided the opportunity to view training tapes if they desire and are compensated for their time up to a certain hourly limit per month.

The FWISD Transportation Department offers 30 hours of training for new drivers, including training for a commercial driver's license (CDL). In addition to this training, some schools arrange training for special education drivers to teach them how to handle the needs of the specific children that they will be transporting. Drivers are also required to take a 20-hour class with the local Regional Service Center to earn certification to transport special students. FWISD pays for the cost of the class and the driver's time.

The Texas Department of Public Safety section of the Texas Administrative Code describes suggested curriculum and time appropriations for school bus driver safety training. The 20-hour curriculum suggests the following time allocations for training in addition to the hands-on behind-the-wheel driver training:

- Introduction: 0.5 hour
- School bus driver's image: 1.5 hours
- Preventive maintenance: 3.0 hours
- Traffic regulations and driving procedures: 1.5 hours
- Defensive driving: 3.0 hours
- Safety and emergency procedures: 3.0 hours
- First aid: 1.5 hours
- Procedures for loading and unloading students: 3.0 hours

- Special education/handicapped child: 1.5 hours
- Awareness of the effects of alcohol and other drugs: 1.5 hours

The FWISD driver training curriculum includes 10 hours for the following topics:

- Rules and regulations
- Defensive driving
- Student management
- Procedures for waiting to load
- Accidents
- Vehicle and driving
- Transportation facility
- Special education

The existing driver curriculum covers many of the same topics as the suggested curriculum, but the allocation of time is much less. The remaining 20 hours of training are behind-the-wheel training.

Between June 1, 2000 and October 24, 2000, 135 drivers entered the FWISD training program. Fifty did not complete the program and were not paid for training. An average of 17 drivers a month completed the drivers' training program during this time period. Driver trainees are paid \$8.25 per hour.

Recommendation 108:

Expand the training program for new drivers to reflect the training curriculum recommended by the Texas Department of Public Safety and provide annual professional training for drivers.

The Transportation Department should integrate the suggested curriculum of the Texas Department of Public Safety section of the Texas Administrative Code with its existing new driver training curriculum.

The allocation of time to each topic should be adjusted to reflect the suggested curriculum. Topics not addressed in the existing curriculum should be added. Topics covered by the Transportation Department that are not included in the suggested curriculum should be included. An hour each for rules and regulations and the transportation facility and two hours for student management training are adequate.

The Transportation Department should develop a curriculum for continuing driver professional training and dedicate eight hours of training per driver per year. Topics such as safety, student management and other

issues identified throughout the year as potential problem areas should be covered during the professional training class.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The manager of Transportation and the safety officers develop a curriculum for the 2001 summer professional driver training.	June 2001
2.	The safety and training supervisor develops a program for identifying potential issues and problem areas that should be included in annual professional training.	Annual
3.	The safety and training supervisor and the manager of Transportation develop a training curriculum.	November 2001
4.	The director of Transportation recommends the expanded driver training curriculum for approval by the associate superintendent of Non-instructional Services for the additional hours for driver professional training.	December 2001
5.	The director of Transportation Services authorizes the safety and training supervisor to expand the training program for new drivers.	December 2001
6.	The safety and training supervisor implements the expanded training program for new drivers.	January 2002

FISCAL IMPACT

Assuming an average of 17 drivers per month, 204 drivers will complete the new driver-training program each year. Increasing the driver-training curriculum by 10 hours per driver will result in an increase of 2,040 training hours per year. At a rate of \$8.25 plus 26.55 percent payroll benefits, additional training for new drivers will cost \$21,298 a year. Since the expanded training program does not start until January 2002, the cost for the first year is half that of other years, or \$10,649.

The driver professional training program will add eight hours for each driver each year. The midpoint of the pay range for a driver is \$14.05. The cost of training for 415 drivers for eight hours each will be \$59,030 (415 drivers x 8 hours x [\$14.05 per hour + 26.55 payroll benefit])

Overall, the cost of this recommendation will be \$69,679 the first year (\$10,649 + \$59,030) and \$80,328 each year (\$21,298 + \$59,030) following.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
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Expand the training program for new drivers to reflect the training curriculum recommended by the Texas Department of Public Safety and provide annual professional training for drivers.	(\$69,679)	(\$80,328)	(\$80,328)	(\$80,328)	(\$80,328)
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Chapter 10

STUDENT TRANSPORTATION

D. School Bus Maintenance

The Transportation Department is responsible for maintaining the school bus fleet. The maintenance of general service vehicles is addressed in Chapter 5, Facilities Use and Management.

In 1998-99, the Transportation Department maintained an active school bus fleet of 380 buses (**Exhibit 10-22**). The average age of the school bus fleet was nine years.

Exhibit 10-22
Active Fleet Inventory By Model Year
1998-99

Year	Total
1982	16
1983	145
1988	4
1990	4
1991	93
1994	55
1995	31
1997	1
1998	31
Total Fleet	380
Average Age in Years	9

Source: FWISD Transportation Department.

Exhibits 10-23 and **10-24** compare the relative age of the FWISD fleet with peer districts.

Exhibit 10-23
FWISD and Peer School District Regular Education Bus Fleet Age
Distribution
1998-99

	Percentage of Regular Education Bus Fleet in Age Category			
District	1 to 5 Years	5 to 10 Years	10 Years to April 1, 1977	Prior To April 1977
Dallas County	41.0%	27%	32%	0%
El Paso	55.0%	13%	32%	0%
Austin	4.07%	6%	47%	0%
Houston	20.0%	23%	57%	0%
Peer Average	40.0%	17%	43%	0%
Fort Worth	18.0%	25%	57%	0%

Source: TEA School Transportation Route Services Report 1998-99.

Exhibit 10-24
FWISD and Peer School District Special Education Bus Fleet Age Distribution
1998-99

	Percentage of Special Education Bus Fleet in Age Category			
District	1 to 5 Years	5 to 10 Years	10 Years to April 1, 1977	Prior To April 1977
Dallas County	54%	36%	10%	0%
El Paso	21%	21%	58%	0%
Austin	30%	12%	59%	0%
Houston	47%	17%	36%	0%
Peer Average	38%	21%	41%	0%
Fort Worth	52%	29%	19%	0%

Source: TEA School Transportation Route Services Report 1998-99.

School bus maintenance is provided at Clark Field and Westside; 294 vehicles are assigned to Clark Field and 86 buses are assigned to Westside. The Clark Field maintenance facility has eight maintenance bays, a parts room, work areas and storage. One maintenance bay has a pit to allow mechanics to work under the bus to perform inspections. The bus parking lot is paved. The Westside facility has two maintenance bays and a parts room. The bus parking lot surface is not paved. The lot supervisor and lead mechanic said the parking lot is near capacity.

The FWISD Budget director was able to provide the budget for bus replacements since 1996-97. Besides the most recent purchase of 161 buses for \$9.2 million July 2000, the only expenditure for new buses was in 1997-98 in the amount of \$113,600.

The fueling system is an automated gas card system and reports are printed each month on fueling activity for each bus. The odometer miles are reported on the fuel report.

FINDING

In 1999-2000, FWISD adopted a school bus replacement plan. The plan called for replacing one-third of all buses once every five years. In July 2000, FWISD purchased 161 new school buses at a cost of \$9.2 million.

FWISD considered three plans for replacing school buses. Plan A replaced 26 buses (one-fifteenth of the fleet) every year beginning in 2000.

According to FWISD records, Plan A would cost \$1,690,000 annually to purchase 26 buses at \$65,000 each. The advantage of Plan A was a regular annual procurement of new buses. The disadvantage of Plan A was that all buses more than 15 years old were not eliminated from the fleet until 2013.

Plan B was a lease-purchase plan to ensure no bus in the fleet was more than 15 years old. The lease term was assumed to be 5 years, and the interest rate was assumed to be 5 percent. According to FWISD records, Plan B would cost between \$1,134,562 and \$3,134,067 annually including vehicle and finance costs. The larger amount begins in 2016 and is due to the cumulative effect of new lease-purchase agreements each year. The advantages of Plan B were to replace all buses more than 15 years old immediately and then to retire any bus that reached 15 years of service. The disadvantages of Plan B were an erratic procurement plan (only the buses 15 years of age were replaced each year) and the cost of financing the lease-purchase of buses.

Plan C was a lease-purchase plan to replace one-third of all school buses (127 buses) once every five years. The lease term for Plan C was also assumed to be 5 years, and the interest rate was assumed to be 5 percent. According to FWISD records, Plan C would cost \$1,906,697 annually. Plan C replaces all buses over 15 years of age by 2005. The advantage of Plan C was to replace older buses sooner than 2013 as provide in Plan A and to reduce annual debt financing by incurring new debt only as old debt was retired (every five years).

FWISD adopted Plan C. The plan called for FWISD to immediately replace 127 of the 161 buses in the fleet purchased in 1982 or 1983. The

remaining 34 older school buses would remain in service until 2005. However, in July 2000, the district identified sufficient funds to replace all of the 161 buses purchased in 1982 and 1983. Each new bus cost approximately \$57,150 for a total cost of \$9.2 million.

Although all buses older than 15 years will be replaced in 2000-2001, FWISD is still planning to follow Plan C to replace one-third of the school buses every five years. The disadvantage of Plan C is the purchase of large numbers of buses every five years, creating a significant increase in maintenance demand due to fleet campaigns. With the purchase of 161 new buses, 42 percent of all FWISD school buses were purchased in one year. Major preventive maintenance tasks will come due in the same year for almost one-half the fleet. If any fleet campaign is required for the new buses, 161 buses will have to be scheduled for service or repair.

The life of a school bus is generally accepted to be 10 years of service or 200,000 service miles. If the years of service is the only criterion for replacing buses, a bus would be replaced every 10 years. An average bus in the FWISD fleet operates 14,400 miles per year. If the miles of service is the only criterion for replacing buses, a bus would be retained in the active fleet for 14 years.

Other factors and the cost of maintenance should also be considered in establishing a district policy on replacement of buses. Not all buses operate the same number of miles each year. Some types of service (routes with many stops and many daily student riders) may cause more wear and tear on a bus. Many factors can affect the useful life of a school bus. FWISD does have an aggressive preventive maintenance program, so buses can be expected to provide a longer service life. The cost of maintenance per vehicle can also be monitored with VMIS software to determine when a vehicle should be replaced to save operating costs.

Recommendation 109:

Revise the fleet procurement plan to replace buses annually based on miles operated, years of service and cost of maintenance.

The buses to be replaced each year should be determined based on years of service, total miles operated, and the cost of maintenance. Some buses may be retired in 10 or 12 years, other buses may be kept in active service up to 18 years. The 161 buses purchased in 2000 should be replaced over at least six years, rather than in one year as provided in Plan C.

A fleet procurement plan to replace a similar number of vehicles every year based upon several criteria (age, miles and cost) can provide several advantages. New buses are introduced into the fleet each year. Annually

the buses with the highest cost of maintenance can be replaced. Regular purchase of buses requires a smaller annual budget allocation rather than a large capital requirement every five years. A procurement contract can include a multi-year purchase of buses. The purchase of buses will save the cost of financing for a lease-purchase.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director for Transportation revises the fleet procurement plan.	June 2001
2.	The associate superintendent of Non-instructional Services presents to the superintendent and board the proposed fleet procurement plan for approval.	July 2001
3.	The director for Budget reflects the fleet procurement plan in the capital budget.	Fiscal 2001-02
4.	The director of Transportation submits a request for purchase of eight school buses in July 2001.	July 2001

FISCAL IMPACT

Purchasing eight buses the first year allows the district to replace all buses older than 10 years. Assuming each bus will cost \$55,000 per Texas General Services' contract prices, the district's first-year costs are \$440,000 (\$55,000 per bus x 8 buses). The district could subsequently stay ahead of, or on par with, a 15-year replacement schedule by purchasing 23 buses each year thereafter at \$1,265,000 annually (\$55,000 per bus x 23 buses).

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Revise the fleet procurement plan to replace buses annually based on miles operated, years of service and cost of maintenance.	(\$440,000)	(\$1,265,000)	(\$1,265,000)	(\$1,265,000)	(\$1,265,000)

FINDING

The Transportation Department's spare bus ratio is too small to adequately cover for the peak bus requirement. Spare buses cover for peak buses that are out of service due to maintenance or breakdowns. The industry

accepted range for a spare ratio is 10 to 20 percent of the regularly scheduled peak buses. The factors affecting the spare bus ratio are fleet age, effectiveness of the maintenance program, climate, operating conditions and fleet mix.

The peak requirement for FWISD in 2000-01 is 353 buses. The district's total bus fleet is 380 buses. Twenty-seven buses are spares-a spare ratio of 7.7 percent. The fleet replacement plan calls for sale of the 161 of the oldest buses for salvage value once the new buses arrive.

When the 161 new buses arrive, FWISD will have a substantially new fleet. The new buses, however, are air-conditioned and will require additional inspection and repair hours for maintenance.

Recommendation 110:

Maintain a spare bus ratio of 15 percent.

A 15 percent spare ratio for 353 peak buses requires a total fleet of 406 buses. Twenty-six of the buses in the best mechanical condition should be kept to use as spares. The buses should be kept in the fleet until FWISD benefits from the reduction in peak bus requirements with improved route and schedule efficiencies discussed earlier in this chapter.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The manager of maintenance evaluates the fleet of older buses and determine which buses are the most appropriate to keep using as spares.	June 2001
2.	The director of Transportation recommends to the associate superintendent of Non-instructional Services that the 26 buses be included in the active bus fleet for the 2001-02 year.	June 2001
3.	The manager of maintenance and the director of Transportation schedule the 26 buses for sale as surplus as soon as the number of peak buses is reduced sufficiently to reduce the need for as many spares.	August 2002

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The Transportation Department does not use an automated vehicle maintenance information system (VMIS). The department uses manual

procedures to track vehicle maintenance and inspection practices. All records for school bus maintenance are hard copy.

Southwest International Trucks Inc. provided the Transportation Department, at no cost, a desktop computer and the software for a parts inventory and service information system. The software can keep records of parts and labor by vehicle using a work order system. A representative of Southwest International Trucks Inc. said the value of the computer and software is \$3,000. Installation and training will be provided without charge. The vendor and the maintenance manager are working together to find a time when the software can be installed. The vendor is not providing computers for the maintenance shops or printers to print the work orders.

School buses are scheduled for a preventive maintenance inspection every 45 days. The maintenance manager has a printed calendar to schedule the inspections. The numbers of the buses to be inspected are written in the calendar block for each workday. The number of each bus is written on the calendar every 45 days on the appropriate workday.

The maintenance manager also monitors mileage reports on the monthly fuel system reports to schedule regular fluid changes. The goal is to change fluids in gasoline vehicles every 4,000 miles and in diesel buses every 6,000 miles.

FWISD buses averaged 14,400 miles in 1998-99. The 45-day preventive maintenance schedule calls for an inspection eight times per year. The average gasoline bus is scheduled for fluid checks three or four times per year, or about every other preventive maintenance inspection. The average diesel bus is scheduled for fluid checks two or three times per year, or about every third preventive maintenance inspection.

All maintenance work is documented on a series of forms. Each repair is recorded on a work order. The maintenance manager uses the calendar and the mileage intervals to ensure all buses are inspected on a regular cycle. All preventive maintenance and repairs are recorded on hand-prepared work orders. The work orders include documentation of labor and parts. The hard copies are filed in a folder for each bus that is designated as the bus history file.

Bus drivers inspect buses daily and promptly follow up on any problems found. A bus inspection check sheet is maintained in each bus and drivers are required to conduct pre-trip inspections. The driver delivers the check sheet to maintenance if any problem is found. The manager of maintenance or lead mechanic assigns a work order to a mechanic. The

work order stays with the mechanic until all repairs are completed. Most repairs are completed the same day.

Drivers who participated in a focus group discussion with TSPR reported a high level of confidence in the quality of school bus maintenance. The drivers said repairs are made promptly, and buses are in safe working condition.

The manager of maintenance also tracks fuel use by school bus. Buses are fueled at Clark Field and Westside. The Transportation Department uses an automated fuel management system with gas cards to track fuel use for each bus. Fuel use is reported by bus in a monthly printout.

Recommendation 111:

Purchase equipment to implement a VMIS system to schedule preventive maintenance inspections, track vehicle maintenance records, analyze vehicle maintenance costs and monitor warranty on new vehicles.

A VMIS system provides maintenance personnel with a way of quickly getting information on the fleet. The Transportation Department installs the vendor supplied software. Once a VMIS is implemented, the manager of maintenance should regularly review the VMIS reports to track and evaluate cost, labor hours expended, warranty repairs and parts usage.

Mechanics should enter data from each work order in progress each day. The VMIS data should be available to the mechanics to pull information such as daily reports for vehicles that are due for inspection or the maintenance history of a specific vehicle.

The data from the fuel management system can be incorporated into the VMIS database to help track fuel use and inspection intervals based on miles per bus.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The manager of maintenance and lead drivers receive training and learn the features of the software package available for VMIS system.	June 2001
2.	The director of Transportation prepares a request for computers and printers to implement a VMIS system.	June 2001
3.	The Informational Technology Department assists the vendor in providing adequate training for the manager of maintenance, the lead mechanics and the parts clerk.	August 2001

FISCAL IMPACT

A one-time cost of \$6,000 is estimated for the two computers and printers to be installed in each of the two maintenance shops at Clarke Field and Westside.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Purchase equipment to implement a VMIS system to schedule preventive maintenance inspections, track vehicle maintenance records and analyze vehicle maintenance cost.	(\$6,000)	\$0	\$0	\$0	\$0

FINDING

There is no parts inventory management system at either Clark Field or Westside. The decision to order new parts is up to the judgment of the parts clerk. There is no procedure in place to determine if a particular supply is low other than visual inspection and an estimation of how often the part is used. To help manage the inventory, the parts clerk at Westside created a personal spreadsheet file to avoid looking up information on the paper hard copies.

Without an inventory management system, the Transportation Department does not know the value of the stock in the parts room. The parts that are used are recorded on each work order. The parts clerk does not have a way to track parts, quantities used and cost. The FWISD provided a budget report for Transportation that listed an expense of \$585,052 for "Other Supplies/Maintenance."

Some public agencies contract parts supply and inventory management to a private business. Some of these agencies include the Virginia Department of Transportation; the City of Richmond, Virginia; the City of Cary, North Carolina; the City of Savannah, Georgia; and Mecklenburg County, North Carolina.

Mecklenburg County's Fleet Management Department contracts its parts supply and inventory management to NAPA General Services Division. As part of the contract, NAPA opened a retail outlet in the Fleet Management Department that operates like a regular NAPA store. NAPA owns the parts, provides NAPA employees to operate the outlet and treats the Fleet Management Department mechanics as customers. Mecklenburg County identified many benefits to privatizing parts supply and inventory

management. The County no longer deals with 78 individual vendors; NAPA is the single vendor. The number of purchase orders for parts was 400 a month. Now NAPA stocks 90 percent of the parts the county needs and provides parts not in stock within 24 hours. As a result, repairs are never held up due to lack of parts. Because NAPA is responsible for supplying the stock, the Fleet Management Department employees no longer need to take the time to drive to vendors to pick up parts, saving non-productive time for mechanics. Other services by a private company can include disposal of tires, batteries, motor oil and other fluids and materials and tracking parts warranties. The director of Fleet Management for Mecklenburg County said the parts supply and inventory management contract has saved the county \$160,000 in lower administrative costs.

Dallas ISD awarded a contract to NAPA to establish a retail outlet in the Fleet Maintenance department. The retail outlet opened the second week of November 2000. The director of Environmental Services for Dallas ISD, who is responsible for fleet maintenance, said the program is working well, and they are able to get the parts they need for school buses. The director of Environmental Services said NAPA has set up agreements with suppliers of proprietary parts and is able to get some of these parts at lower cost since NAPA has buying power and can pay for the parts within 30 days.

Privatization saves money on parts. A 30 percent markup more than wholesale is typical when parts are purchased in competitive bid bulk purchase. A 100-percent markup more than wholesale is typical when parts are purchased retail over the counter using an emergency purchase order. A sample NAPA contract calls for 10 percent markup plus the cost of overhead to provide a parts clerk.

Recommendation 112:

Investigate outsourcing parts supply and inventory management.

FWISD should contact the Virginia Department of Transportation, the City of Richmond, the City of Cary, the City of Savannah, Mecklenburg County, or Dallas ISD to learn about their retail parts contracts and to determine the feasibility of outsourcing the parts management function at FWISD.

FWISD should prepare a request for proposals (RFP) and ask private vendors to demonstrate if privatization could reduce costs and meet other objectives of the district to improve inventory management. FWISD should obtain examples of RFPs for privatizing parts supply and inventory management from the public agencies listed above. FWISD should use

these RFPs as models to draft a scope of services for the RFP. Some of the services can include the following:

- Supply parts
- Provide inventory management and control
- Research parts
- Inspect parts and track warranty
- Assume responsibility for organization and security of the parts room
- Provide software to record each part issued by work order and vehicle for the VMIS record
- Staff the parts room during all hours mechanics are on duty

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The manager of maintenance for Transportation, the manager of the warehouse for Facilities and the associate superintendent of Non-instructional Services contact the public agencies listed above to learn about the advantages and disadvantages of the retail parts outlet.	June 2001
2.	The associate superintendent of Non-instructional Services and the director of Procurement determine discuss the advantages and disadvantages of a retail parts outlet for FWISD Transportation and Facilities.	June 2001
3.	The associate superintendent of Non-instructional Services prepares a RFP with the assistance of the director of Procurement and other department directors as appropriate. Selection criteria and evaluation methodology are defined.	July 2001
4.	The superintendent obtains approval from the school board to issue the RFP.	September 2001
5.	The director of Procurement issues the RFP.	September 2001
6.	The director of Procurement receives proposals from vendors.	November 2001
7.	The manager of maintenance for Transportation, the manager of the warehouse for Facilities and the associate superintendent of Non-instructional Services evaluate proposals.	November 2001
8.	The manager of maintenance for Transportation, the manager of the warehouse for Facilities and the associate superintendent of Non-instructional Services conduct interviews of the qualified vendors.	December 2001

9.	The manager of maintenance for Transportation, the manager of the warehouse for Facilities and the associate superintendent of Non-instructional Services prepare an analysis of the proposal evaluation and interviews.	December 2001
10.	The superintendent presents the analysis of the various proposals and a recommendation for privatization of parts supply and inventory management to the school board.	January 2002

FISCAL IMPACT

FWISD would experience savings through a reduced markup above wholesale on the purchase of parts. The retail markup more than wholesale on the purchase of parts is conservatively estimated to be 30 percent. The outsourced markup on the purchase of parts is estimated at 10 percent plus a 2 percent allowance for overhead, for a total of 12 percent.

The value of the parts budgeted by FWISD was \$450,000. With the 30 percent markup, FWISD pays \$135,000 more than the cost of parts. With the 12 percent markup, FWISD would only pay \$54,000, a savings of \$81,000 per year.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Investigate outsourcing parts supply and inventory management.	\$0	\$81,000	\$81,000	\$81,000	\$81,000

FINDING

FWISD does not specify the Automotive Service Excellence (ASE) certification as a condition of employment. The Transportation Department has an apprentice program for mechanic advancement to master mechanic. The apprentice program has four levels, beginning with minor repairs and oil changes at the lowest level and expanding to major repairs and glass and body work at the highest level. The maintenance manager provided a one-page description of the program. The apprentice level qualifications were simply a list of experiences required for each of four levels.

FWISD school mechanics do not receive comprehensive in-house training. The manager of maintenance said vehicle vendors supply any formal training the district mechanics receive. The director of Transportation said the Transportation Department started providing eight hours of training to mechanics at the first of the year.

ASE certification requires several steps. The candidate usually registers and takes one of more than 33 ASE exams. In 1997, ASE developed a series of eight School Bus Technician tests at the request of the National Association for Pupil Transportation. These exams cover diesel engines, the drive train, brakes, suspension and steering and electrical systems. After passing one or more exam and providing proof of two years of relevant work experience, the mechanic becomes an ASE-certified technician. Tests are conducted twice a year at more than 700 centers nationwide. Technicians must be re-certified every five years.

The ASE program is not a training program. ASE is a testing program that certifies the knowledge and skills a mechanic already possesses. To maintain ASE certification, a mechanic needs both initial and continued training.

The Texas Association of School Bus Technicians (TASBT) also just developed an annual safety inspection certification program for school bus vehicle inspections. The purpose of the program is to provide guidelines for school bus vehicle inspections through standardization. The TASBT program is not approved by the state. TASBT also offers a six-hour class on how to prepare for the ASE tests.

Recommendation 113:

Reward mechanics that achieve ASE certification.

FWISD should develop an incentive program to encourage mechanics to achieve ASE certification. FWISD should offer a pay bonus for mechanics who successfully complete the certification.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Transportation recommends to the associate superintendent of Non-instructional Services that FWISD provide a bonus to mechanics who receive ASE certification.	June 2001
2.	The associate superintendent of Non-instructional Services recommends to the superintendent and School Board that FWISD provide a bonus for mechanics who receive ASE certification.	July 2001
3.	The superintendent authorizes the bonuses.	August 2002
4.	The mechanics are advised of this new opportunity to earn bonuses for ASE certification.	September 2002

FISCAL IMPACT

The pay incentives are estimated at a \$500 bonus for each course passed. The total cost is assumed to be \$4,000 per mechanic (\$500 per test x 8 ASE tests for school bus certification). In the first year, the estimate assumes that two mechanics take and pass two tests each for a total bonus of \$2,000 (\$500 x 2 tests x 2 mechanics). The second year, the first two mechanics take and pass an additional four tests each and two additional mechanics take and pass the first four tests for a total bonus of \$8,000 (\$500 x 4 tests x 4 mechanics). For every year thereafter the bonus will be \$8,000.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Reward mechanics when they achieve ASE certification.	(\$2,000)	(\$8,000)	(\$8,000)	(\$8,000)	(\$8,000)

Chapter 10

STUDENT TRANSPORTATION

E. Outsourcing Student Transportation

FINDING

The district has not evaluated the feasibility of privatizing transportation services in the past ten years. FWISD conducted two studies in the 1980s to determine feasibility of privatizing transportation, but has not updated the findings.

The primary reason for privatizing school transportation is to reduce cost. School districts choose to privatize for many additional reasons. Private providers offer some of the following advantages:

- Contractors often have a broad range of experience dealing with the challenges of providing student transportation in a numerous school districts. This experience may allow a contractor to solve district student transportation problems more quickly and effectively.
- Performance clauses can be included in the contract to ensure improved quality of services. For example, the private contractor can be required to meet a standard for on-time performance.
- Incentive clauses can be incorporated in the contract to increase efficiency. For example, the district can include a clause that allows cost savings resulting from route reductions proposed by the contractor-savings shared by the district and the contractor.
- The private contractor can be required to implement an appropriate cost accounting system to monitor cost-efficiency and cost-effectiveness and to better monitor and control cost by function and service category.
- The private contractor may provide better driver safety training and automated route and schedule programs. A contractor may offer these services more cost-effectively due to economies of scale.
- By privatizing the ancillary function of school transportation, district administrators can re-focus attention on core educational functions.
- If the contractor provides the district with school buses, the district is no longer faced with large capital outlays to replace the school bus fleet.

Private transportation companies told TSPR that they target all of the following success factors when determining whether they can provide

transportation services for school districts better and cheaper than the districts. An evaluation of FWISD transportation services against key success factors is summarized in **Exhibit 10-25**.

Exhibit 10-25
Comparison of FWISD Transportation Services to Key Success Factors

Success Factor	Status of FWISD Performance Against Success Factor
Productivity	<p><u>Strength</u></p> <ul style="list-style-type: none"> • Linear density for TEA allocation is 1.789 student riders per mile for regular education. <p><u>Weakness</u></p> <ul style="list-style-type: none"> • Student riders per mile for regular education are 17 percent below the peer average and riders per mile for special education are 40 percent below the peer average. • The Transportation Department has not set benchmarks for performance standards. There is no performance monitoring system to collect data and report trends.
Transportation Cost	<p><u>Strength</u></p> <ul style="list-style-type: none"> • Allotment from TEA is \$1.25 per mile for regular education. <p><u>Weakness</u></p> <ul style="list-style-type: none"> • Operations cost per rider for regular education increased 41 percent over five years and is 2 percent above the peer average. • Operations cost per rider for special education increased 65 percent over five years and is 54 percent above the peer average.
Management Information Systems	<p><u>Strength</u></p> <ul style="list-style-type: none"> • The automated fueling system provides fuel inventory

	<p>management.</p> <ul style="list-style-type: none"> Schools and sponsors can plan field trips using automated scheduling software. <p><u>Weakness</u></p> <ul style="list-style-type: none"> Budget reports are not available to analyze student transportation cost on a routine basis. No management information system exists to link budget and expenditure data to other transportation performance indicators. Payroll records and reports are not available to analyze attendance or to monitor hours worked. Training to use new automated routing and scheduling software in August 2000 was not sufficient. Transition planning for 2000-01 was not adequate. An automated vehicle management information system is not used to document cost, track maintenance and repair by bus, and monitor warranty for new school buses.
Organizational Structure	<p><u>Strength</u></p> <ul style="list-style-type: none"> The department is organized into three functional areas: operations, maintenance and routing and scheduling. Maintenance is responsible only for school buses. <p><u>Weakness</u></p> <ul style="list-style-type: none"> The department does not have a section specifically dedicated to safety and training.
Human Resources	<p><u>Strength</u></p> <ul style="list-style-type: none"> Driver and bus attendant positions are filled. The Transportation Department has a Recruitment Team to recruit new school bus drivers and expedite the procedures to hire qualified candidates. The district regularly adjusts pay rates for school bus drivers and bus attendants to provide a competitive wage. An Employee Advisory Committee and liaison officer represent initiatives to resolve problems and improve

	<p>communication between management and labor.</p> <p><u>Weakness</u></p> <ul style="list-style-type: none"> • The routing and scheduling function does not have enough experienced and trained staff. • The department does not have full-time dispatchers. • Drive absenteeism is reported to be high but the absentee rate is not tracked. Absences due to workers' compensation claims are reported to be very high but cannot be verified. • Supervisors, mechanics and administrative personnel are required to drive school buses when there are not enough drivers. • Overtime hours are not monitored. • The department does not sponsor continuing professional training for employees.
Management of Staff	<p><u>Strength</u></p> <ul style="list-style-type: none"> • Employees are dedicated to providing a quality service for the students. <p><u>Weakness</u></p> <ul style="list-style-type: none"> • The drivers to supervisor ratio is low at 43:1. When team leaders are included as supervisors, the driver to supervisor ratio is 22:1. • The ratio of school buses to mechanic is low at 17:1.
Overtime	<p><u>Strength</u> None</p> <p><u>Weakness</u></p> <ul style="list-style-type: none"> • Overtime is reported by management to be high but there are no supporting records. Overtime trends are not monitored. Cost of overtime is not recorded.
Safety	<p><u>Strength</u></p> <ul style="list-style-type: none"> • Claims reports of accidents from risk management show an excellent safety record. • Drivers receive retraining after an accident

	<ul style="list-style-type: none"> Cameras are used to record student behavior on buses and assist in managing student behavior. <p><u>Weakness</u></p> <ul style="list-style-type: none"> A driver coordinates training for new drivers on a part-time basis. Six additional drivers assist on a part-time basis.
Preventive Maintenance	<p><u>Strength</u></p> <ul style="list-style-type: none"> Buses are in good repair. Regular preventive maintenance inspections are conducted on time. New buses are arriving to replace buses purchased in 1982 and 1983. <p><u>Weakness</u></p> <ul style="list-style-type: none"> The department does not use an automated vehicle maintenance information system (VMIS). The maintenance manager uses manual procedures to track vehicle maintenance and inspection practices. Procedures are not in place to track warranty on 161 new school buses.

Source: TSPR Review Team.

There are also possible disadvantages to private sector contracting that must be considered by the district.

- If the contractor provides the district with school buses, the cost of providing vehicles will be amortized as operations cost over the term of the contract. The annual impact of the cost of vehicles will vary by the length of the contract and the required average age of the school bus fleet.
- If competition is not adequate, the contractor's price may not reflect the cost savings targeted by the district.
- A contractor may under-price a bid to receive the contract and then attempt to raise prices after the contract is awarded.
- If the contract terms are not complete (for example, do not address all the services the district will need during the length of the contract), the cost of additional services can result in higher than expected student transportation expenditures.

- The district may have less control of day-to-day operations and procedures if transportation services are privatized.
- Student transportation services could be in jeopardy if the contractor defaults or if there are contract disputes.
- Existing employees of the district will feel uneasy about the transition to a new employer. Wages and benefits may or may not be comparable. Alternatives to protect the benefits of long-term district employees may defeat the contractor's ability to manage and control cost.

A properly structured request for proposal and contract can mitigate some of these disadvantages.

Recommendation 114:

Conduct a feasibility study for outsourcing student transportation and develop a Request for Proposals.

FWISD should first consider if the district can make improvements in performance against the success factors listed above before considering outsourcing student transportation. If the district adopts the recommendations in this chapter, performance will improve and student transportation costs will be reduced. However, the district may consider outsourcing transportation as another way to accomplish the same objectives.

In order to evaluate the feasibility of reducing student transportation costs by contracting with a private company, the FWISD will need to determine the full cost of student transportation. To determine if privatization would save money, FWISD will need to determine the full cost of in-house services, including the cost of buses and facilities, depreciation on these assets and administrative overhead costs. Administrative overhead will include FWISD cost that can be avoided if transportation services are contracted, cost that can be reallocated to another essential district functions and cost that cannot be avoided and will remain a district expense in addition to the private contract. This information is needed when comparing the cost of in-house student transportation services to the costs of contracted services including contract administration cost.

Second, FWISD will need to determine if the local market is competitive. If there are not a sufficient number of prospective bidders, privatization may not generate enough competition to produce price advantages. In addition, a successful bidder may face few incentives from the non-competitive market to perform well. FWISD should prepare a request for letters of interest that provides enough information about the

transportation services and cost to allow private providers to determine if privatization could reduce costs or meet other objectives of the district.

The feasibility study for outsourcing should be documented in sufficient detail to provide an historical record of the objectives for outsourcing student transportation and the feasibility study methodology, analysis and conclusions.

If outsourcing is determined to be feasible, the following decisions should be made before preparing a request for proposals.

- **Determine employee status.** Transportation Services employees will be most affected by a decision by the district to contract student transportation to a private contractor. The transition will create concerns about employment status, pay, benefits and working conditions. Employees who have been with the district several years will have additional concerns about loss of seniority and protection of retirement benefits. The district can consider several options.
- Keep payroll and benefits of Transportation under the district.
- Require the contractor to hire only new employees, while existing employees remain on the district payroll system.
- Transfer only employees with less than a specified number of years of service.
- Provide a transition period from the district to the contractor, thus allowing employees to choose to transfer or seek other employment.
- Cash out accumulated benefits or negotiate roll-over accumulated retirement benefits.

At issue will be loss of the contractor's independence to manage employees and to control and reduce costs.

FWISD will need to develop an employee transition plan for implementation involving the employees and their representatives as much as possible. The district should keep employees informed and listen to concerns. The communication process should start before the request for proposals is actually advertised.

- **Evaluate options to own or contract for school buses.** The district may elect to retain title for the school buses and then lease the vehicles to the contractor. If the contractor provides the district with school buses, the district is not longer faced with large capital outlays to replace school buses. On the other hand, the amortized cost of equipment will be reflected in higher contract operations cost. FWISD should incorporate provisions into the contract for

buying back buses at market value if they wish to resume in-house service.

The request for proposals should include contract provisions that describe performance measures and expectations. The contract for services should contain incentive clauses that encourage contractors to find ways to reduce cost while maintaining high quality services in accordance with performance standards. FWISD will need to closely monitor services provided by a contractor and measure performance against agreed upon standards.

Exhibit 10-26 suggests possible performance measures for service success factors.

**Exhibit 10-26
Suggested Performance Measures for Private Transportation
Contractor**

Category	Performance Measures
Productivity	<ul style="list-style-type: none"> • Student riders per mile • Student riders per route (bus)
Cost	<ul style="list-style-type: none"> • Cost per route • Cost per mile • Cost per student rider • Percent state reimbursement
Safety	<ul style="list-style-type: none"> • Accidents per 100,000 miles of service • Student incidents per 1,000 students transported • Training curriculum for new drivers • Hours of in-service training for each driver • Hours of training for student discipline management and special needs
Service Quality	<ul style="list-style-type: none"> • On-time performance • Maximum length of student time on school bus • Average bus occupancy per trip • Number of regular routes cancelled
Personnel	<ul style="list-style-type: none"> • Number of route driver positions vacant • Number of attendant positions vacant • Absentee rate for route drivers and attendants • Number of available relief drivers

	<ul style="list-style-type: none"> • Annual turnover rate
Customer Satisfaction	<ul style="list-style-type: none"> • Annual user survey of parents, school administrators • Referrals per route • Response time per referral
Vehicle Maintenance	<ul style="list-style-type: none"> • Percent of preventive maintenance inspections completed on-time • Miles between in-service breakdowns • Reported incidents of air-conditioning failure • Cost per bus for maintenance labor, parts and fuel

Source: TSPR.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The associate superintendent of Non-instructional Services determines the full cost of student transportation with the assistance of the director of Transportation and the chief financial officer.	June 2001
2.	The associate superintendent of Non-instructional Services prepares comprehensive contract specifications that include incentives for performance.	July 2001
3.	The associate superintendent of Non-instructional Services and the liaison officer enter into discussions with Transportation employee representatives about their concerns and the implications of privatizing student transportation and begin developing an employee transition strategy.	August 2001
4.	The associate superintendent of Non-instructional Services and the director of Personnel compare the advantages and disadvantages of different employee policies under a private contract.	August 2001
5.	The associate superintendent of Non-instructional Services, the director of Transportation and the chief financial officer compare the advantages and disadvantages of purchasing or contracting for school buses.	September 2001
6.	The associate superintendent of Non-instructional Services prepares the request for proposals with the assistance of the director Transportation and other department directors as appropriate.	October 2001

7.	The associate superintendent of Non-instructional Services recommends the procurement methodology, including policy recommendations for employees and capital purchases of school buses, to the superintendent and school board for approval.	November 2001
8.	The superintendent obtains approval from the board to issue the request for proposals. Selection criteria and evaluation methodology are defined.	December 2001
9.	The superintendent presents the analysis of the various proposals submitted by private school transportation companies and an employee transition plan and school bus procurement plan to the board.	March 2002

FISCAL IMPACT

Industry standards usually estimate savings of 10 percent of operations cost for districts that privatize the transportation functions. Martin County school district in Florida recently awarded a contract to a private provider based on an expectation of 10 percent savings. FWISD could save \$1.2 million (10 percent of the \$12.3 annual operations cost in 1998-99) beginning in 2002-03. However, the savings FWISD might achieve will depend upon whether the district implements the recommendations presented in this chapter. If the recommendations are implemented and the projected savings are achieved, then the savings for privatization will be reduced by approximately \$550,000 to about \$650,000 annually. The expected savings for privatization would be about 5 percent of operations cost. These savings are not claimed since they depend on a decision to be made by the district.

FINDING

FWISD is working with the Fort Worth Transportation Authority (the T) to provide transportation for some FWISD special education students. Shared services between school districts and regional transit authorities have been discussed in three TSPR reports for peer districts.

Until the 2000-01 school year, a small number of special education students were carried on the T's smaller paratransit buses (MITS). In August 2000, the T declined to transport FWISD students on MITS for the 2000-01 school year. The number of students using MITS could not be verified by FWISD or the T. Students using the MITS were reassigned to special education routes. The direct affect on FWISD cannot be isolated for cost analysis. The cost of transportation per rider for MITS is comparable to the cost per ride for FWISD special education transportation.

In November 2000, FWISD needed assistance in transporting two special education students. One student used a wheelchair that was too large for any FWISD special education bus. The second student required transportation for a long distance. No bus route was available for the student, and no special education bus could be provided without displacing eight other students. The director of Transportation asked for the assistance from the T. The regional transit authority agreed to help and is now transporting the two special education students.

The T is interested in promoting a student pass. The pass would be valid for rides on the T buses anytime, not just for school trips. The benefit for the T is additional ridership on existing routes. FWISD could benefit if a sufficient number of students were reassigned to public transit to reduce the number of buses required to serve a school.

A review of the TSPR report for Austin ISD documents concerns about shared services with the regional transit authority. Capital Metro operates magnet routes for AISD. The school district pays \$250,000 annually for the service. Capital Metro reports the actual cost of service is \$736,000, however, greatly exceeding the amount AISD pays for the service. If AISD operated the same routes, the cost would be \$347,000. AISD is also experiencing some disadvantages with the contract with Capital Metro. Capital Metro has complete control over the schedule of routes. The magnet schools had to adjust their bell schedules to accommodate Capital Metro's need to have AISD routes finished before the Capital Metro public routes.

Similar issues about shared services came up in the TSPR report for San Antonio ISD. SAISD has a \$1.2 million contract with VIA Metropolitan Transit to provide morning and afternoon regular bus transportation. The contract is a continuation of services provided by VIA for more than 18 years. In the past, VIA provided bus transportation services for all regular routes and field trips. Because of increased costs, changing federal guidelines and increased demands for field trips and after-school events, VIA determined that it should reduce its transportation commitment to SAISD. The operations officer at VIA said the agency would continue renewing the SAISD contract as long as it is required as a public service. The officer also mentions that VIA buses allocated for SAISD student transportation probably could be used more productively on public routes.

For the Houston ISD review, TSPR encouraged high school students to buy a monthly pass to use METRO services instead of HISD school bus routes. The plan was feasible where bus routes directly serve high schools and operate on a schedule that is appropriate for school bell times. The general manager for METRO said that if student riders were placed on

existing routes, the authority would add capacity as required. However, METRO was not willing to consider adding new routes for HISD students.

Recommendation 115:

Continue efforts to encourage shared services with the Fort Worth Transportation Authority.

The Transportation Department should continue working with the T to find ways to share services for the convenience and benefit of special education students. Both agencies operate buses specifically designed for special needs riders. Anytime a special education student can benefit from the cooperation of the two agencies the efforts are worthwhile.

There may be limited opportunities to share services for regular education students. FWISD could buy the student passes from the T at a discount and give the passes to high school students as an incentive to use public transit instead of the school bus. FWISD would benefit only if a sufficient number of students were reassigned to public transit to reduce the number of buses required to serve a school. FWISD should ask the T's director of Planning and Scheduling to study the feasibility of providing public transit in lieu of school bus service for one high school. If the concept is found to be feasible, then FWISD could consider a policy to provide T passes at no cost to ride public transit rather than school buses.

The cost of transportation per rider for MITS is comparable to the cost per student ride for FWISD special education transportation. There should be no fiscal impact for shared services for special education students.

Shared services to provide public transit for a high school would be financially feasible only if bus routes directly serve high schools and operate on a schedule that is appropriate for school bell times. If additional buses have to be added to serve school trips, the cost for public transit will be more than current FWISD cost.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Transportation approaches the T to discuss potential shared services.	June 2001
2.	The director of Transportation and the representative from the T work together to develop plans for implementing the most feasible shared services.	July 2001
3.	The director of Transportation and representative from the T implement, nurture and track the success and progress of the programs. New programs are investigated and implemented. as	Ongoing

needed.	
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FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 11

FOOD SERVICE

This chapter describes the Nutrition Services Department operations of the Fort Worth Independent School District (FWISD) in the following areas:

- A. Organization and Staffing
- B. Operations
- C. Student Meal Participation
- D. Financial Management
- E. Child Nutrition Education

Public schools should provide appealing and nutritional breakfasts and lunches to elementary and secondary students in an economical manner. Nutritional food choices are critical to the success of any school district's nutrition services program because good dietary habits are clearly linked to high academic performance and lifelong individual and group satisfaction.

BACKGROUND

In *Managing Child Nutrition Programs: Leadership for Excellence*, authors Josephine Martin and Martha T. Conklin maintain that child nutrition programs, especially in sizeable school districts, resemble very large businesses in that they provide an abundance of managerial, financial, human resources and health promotion opportunities and challenges. In 1998, the federal budget for child nutrition programs exceeded \$5 billion, with nearly 95,000 schools participating in the federal lunch program and approximately 31,000 participating in federal breakfast programs.

Nutrition services is a dynamic process undergoing constant change as a result of evolving federal, state, and local regulatory processes; advances in technology; demographic changes; societal and community expectations; new food product availability; participation in federal food commodities programs; strategies to maintain or increase the number of students engaged in educational processes; competition from vending and other food venues on school premises; "open" or "closed" lunch periods in high schools; and the changing needs and tastes of students as both food consumers and customers.

Nutrition services directors in school districts must plan for a multitude of contingencies that affect revenues and services by developing, implementing, managing and evaluating seamless programs that are responsive to possibilities such as:

- emergency feedings;
- equipment breakdowns;
- meal distribution from centralized locations;
- expanded school days;
- introductions of both after-school snack and summer feeding programs;
- creating universal breakfast programs;
- incorporating child nutrition and food programs into school district health programs; and
- making child nutrition programs an integral part of their respective community's social services system.

The Texas School Food Service Association (TSFSA) has identified 10 standards of excellence for evaluating TSFSA programs. TSFSA states that effective programs should:

- identify and meet current and future needs through organization, planning, direction and control;
- maintain financial accountability through established procedures;
- meet the nutritional needs of students and promote the development of sound nutritional practices;
- ensure that procurement practices meet established standards;
- provide appetizing, nutritious meals through effective, efficient systems management;
- maintain a safe and sanitary environment;
- encourage student participation in food service programs;
- provide an environment that enhances employee productivity, growth, development and morale;
- promote a positive image to the public; and
- measure success in fulfilling regulatory requirements.

Under the School Lunch and Breakfast Agreement, a legal contract between the Texas Education Agency (TEA) and FWISD, the district is subject to coordinated reviews by the TEA. The last coordinated administrative review was conducted in March 1998. Four minor findings resulted in timely and responsive corrective actions taken by the Nutrition Services Department.

FWISD maintains 120 kitchens that serve a total of 127 schools. The district uses a point-of-sale (POS) system called Student Nutrition Accountability Program (SNAP) to track all sales and quantities of items sold.

Registered dietitians within FWISD have performed analyses demonstrating that all Type A meals offered in the district are nutritionally adequate and conform to federal guidelines. Type A meals are those meals

qualifying for federal reimbursement, which contain appropriate portions of pint milk, meat or meat alternatives, fruits and vegetables and specific servings of bread, pasta or grain per week. Nutrition Services attempts to provide appealing meals by engaging in extensive recipe testing, various feedback mechanisms including student surveys and student panels to evaluate proposed meal items.

Several factors are used to evaluate departmental and cafeteria productivity: 1) meals served per labor hour (MPLH); 2) food cost control; 3) rate of student participation in breakfast and lunch programs; 4) wait time per student served; 5) financial self-sufficiency; and 6) school cafeteria workflow analysis.

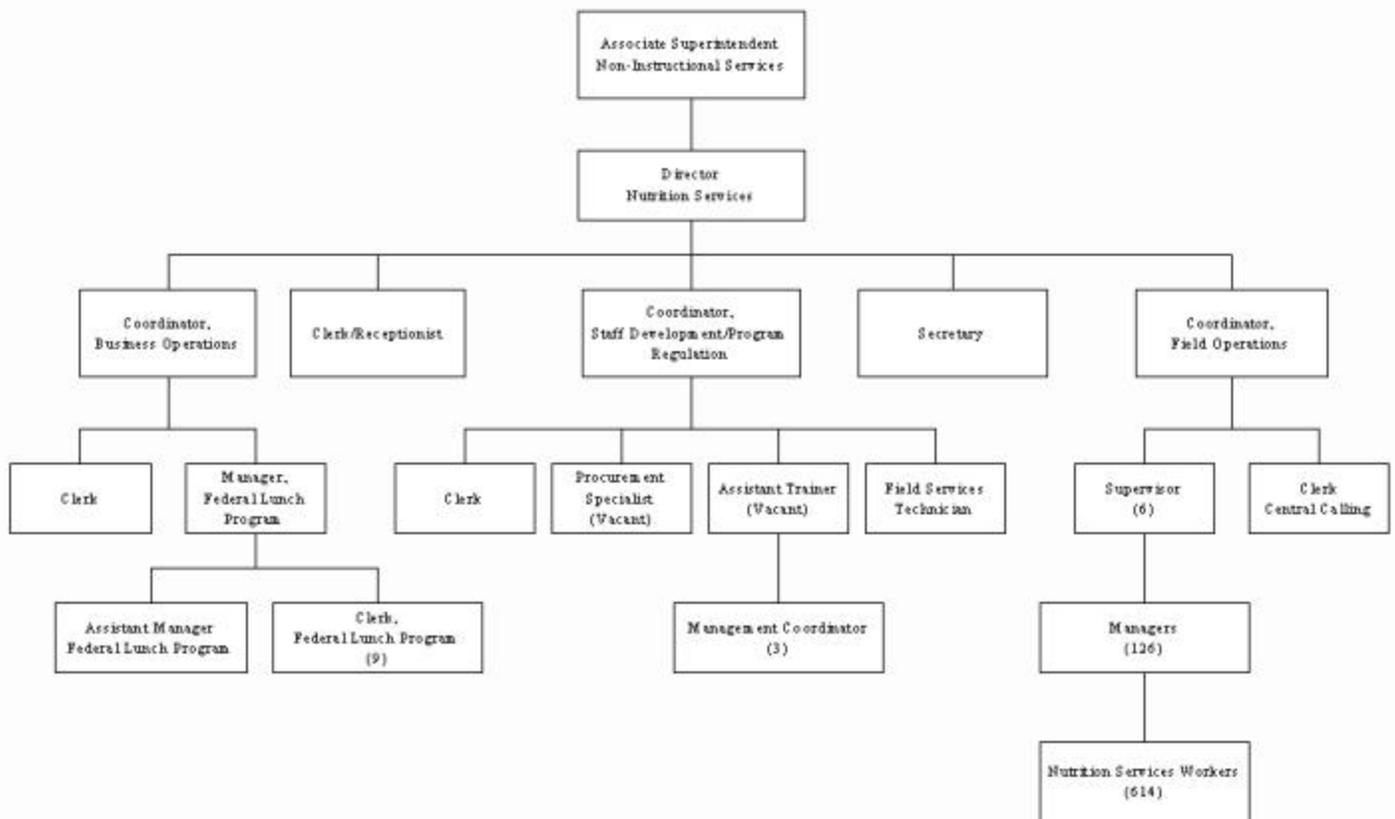
Chapter 11

FOOD SERVICE

A. Organization and Staffing

FWISD's nutrition services program is managed by the Nutrition Services Department, which reports to the associate superintendent for Non-Instructional Services. **Exhibit 11-1** presents the organizational structure and staffing for the department. The department employs 772 workers, including the director, 22 central office or clerical employees, three management coordinators, six food service field supervisors, 126 cafeteria managers and 614 cafeteria employees. In addition, the department maintains a pool of substitute cafeteria workers who are available to replace permanent employees on sick or bereavement leave during normal work hours.

Exhibit 11-1
FWISD Nutrition Services Organization
2000-2001



Source: FWISD Nutrition Services Department, October 2000.

The district's 127 schools are divided into six areas with each area managed by a field supervisor.

In addition to the positions reflected in the organizational chart, the Nutrition Services budget is charged with a portion of salaries and benefits for an additional 26 positions that report to either the Maintenance Department or the Central Services Department. Twelve of these positions report to the Central Services Department and 14 report to the Maintenance Department. The Central Services employees work in the Food Services Warehouse and are responsible for receiving and processing deliveries from vendors and delivering food and cafeteria supply items to the district's 127 schools. The Maintenance Department employees are responsible for maintaining and repairing cafeteria facilities and equipment. Included in the 26 positions are a portion of salaries and benefits for the director of Central Services and warehouse administrative staff.

The Nutrition Services director is a registered, licensed dietitian and has been employed by the district for 10 years. All the coordinators and six food service field supervisors have baccalaureate degrees.

All Nutrition Services administrators and supervisory personnel were interviewed both individually and in groups at the central Nutrition Services office. Additionally, TSPR visited 15 schools to observe meal services, kitchen sanitation and work flow efficiency and to conduct cafeteria manager interviews and hold focus groups of cafeteria personnel. TSPR also conducted a survey of the 126 cafeteria managers to supplement the information obtained during personal interviews. The survey was designed to determine operational aspects of time management, task analysis, and management productivity, as well as cafeteria managers' perceptions of the Nutrition Services central office and their particular school environment.

A total of 106 cafeteria manager surveys were completed and analyzed. **Exhibit 11-2** presents a sample of survey statements showing the percentage of respondents either agreeing or mostly agreeing with survey statements.

Exhibit 11-2
Survey of FWISD Cafeteria Managers
Percent of "Agree" or "Mostly Agree" Responses
October 2000

Survey Statement	Percent Agree/ Mostly Agree
My staff works well together most of the time.	93%
The menus we use at our school provide good nutrition to the students.	86%
My Food Service supervisor is effective in helping my staff and me achieve the requirements of our school's food service.	82%
The principal at my school understands the challenges of my staff and me.	78%
The students appreciate the Food Service at my school.	76%

I am happy in my job.	75%
The menus are easy to prepare almost all of the time.	71%
The parents of the students are generally helpful and friendly at our school.	71%
My performance evaluations are fair.	71%
My staff and I would benefit from more staff development and computer training.	69%
The teachers at my school are generally helpful.	68%
The menus usually contain a good combination of foods that go together.	62%
We need more carts and/or shelves at my school.	62%
The Food Service coordinator who manages training and who directs the menu programs is receptive and helpful to my needs.	61%
I have large equipment in my kitchen that needs replacement or repairs.	58%
I have adequate staff at my school to perform the duties required for the cafeteria Food and Nutrition Services.	58%
The Nutrition Services director is responsive to my needs in a timely fashion.	58%
The Food Service coordinator who manages the Food Service supervisors is helpful with meeting my needs.	58%
Lunch card operations are efficient at the school.	57%
Maintenance requests are completed in a timely fashion most of the time.	53%
When I order things like brooms, spatulas, foil, plastic wrap, pans, spatulas, potholders, dippers or knives, I usually receive them within two weeks.	53%
The air conditioning is adequate in my kitchen.	52%
I sometimes pay for supplies out of my own pocket.	44%
I usually have the time I need to fill out the paperwork for my job.	37%
The floors in my kitchen are in good shape.	35%
I feel I have a voice in FWISD's Nutrition Services.	34%
I have time to provide my employees with the training they need.	31%

Source: FWISD cafeteria managers and TSPR

Survey responses in general were positive, with 93 percent of the cafeteria managers surveyed reporting that their staff worked well together most of the time, and 82 percent agreeing that they received effective support from their Food Service supervisors. Eighty-six percent of managers stated that the menus used at their schools provided good nutrition and 71 percent said the foods on the menu were easy to prepare. Seventy-five percent stated they were happy in their job, and 78 percent agreed that the

principal at their school understood the challenges of the cafeteria and its staff. Seventy-six percent said students at their schools appreciated the food service, while 71 percent said parents were generally helpful.

While the survey of cafeteria managers was generally positive, the survey also indicates that there are some challenges facing the department. Only 58 percent of managers report that they have adequate staff. Several managers said in interviews that they take their paperwork home in order to complete it. Sixty-nine percent of the managers report their staff would benefit from additional training and in-service education, but only 31 percent say there is enough time to provide it. In addition, 47 percent of managers reported they did not receive small equipment such as spatulas, pans, brooms, potholders or disposable plastic wrap and aluminum foil within two-weeks of ordering them. Only 34 percent of cafeteria managers felt they had a voice in the department.

FINDING

Lack of adequate staffing in school cafeterias is affecting productivity, quality of service and employee morale in FWISD school cafeterias. Nutrition Services uses a substitute cafeteria worker pool to replace regular contract employees who are absent on a particular day. To qualify as a substitute, an individual must attend a one-day training seminar at the Nutrition Services central office.

Substitute workers are paid \$6.50 per hour, are not eligible for benefits and have no guarantee of work. As a result, they are often not available when needed. All too often, cafeterias are short-staffed when an employee calls in sick.

In 2000, the district began the school year with a pool of 80 substitute employees. By the end of the year the pool was reduced to 35 employees. As the substitute pool is reduced, the availability of employees to cover absent positions is limited.

FWISD cafeteria workers and managers expressed frustration concerning the consistent lack of available substitutes in the cafeterias. Responses to the cafeteria manager survey, shown in **Exhibit 11-2**, show that only 58 percent of survey respondents feel that had the staff necessary to perform the duties required for cafeteria operations.

Recommendation 116:

Hire permanent floater employees to fill absent positions.

Assign five permanent floater employees to each of the six food service field supervisors, and have them report to work every morning. Five floater employees for each of the six areas would provide adequate coverage for all cafeterias. Each field supervisor can assign floater employees on a daily basis to schools needing extra help.

Increasing the hourly rate for floater employees from \$6.50 to \$7.50 while allowing floater employees to earn district benefits will help to keep the schools' cafeterias fully staffed.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The Nutrition Services director, coordinators and area supervisors review overtime, absenteeism records and determine the number of full time contract rotating employees that will be needed.	June 2001
2.	The Nutrition Services director develops a job description for permanent floater employees.	June 2001
3.	The Personnel Department posts the job openings for permanent floater cafeteria employees.	June 2001
4.	The area supervisors interview and hire 30 permanent floater employees.	July 2001
5.	The permanent floater employees report to work.	August 2001

FISCAL IMPACT

The total annual cost of hiring permanent floater employees is \$311,559. This cost estimate assumes that the district hires 30 floater employees at an hourly rate of \$7.50. Variable payroll benefits are 24.23 percent of gross pay and fixed benefits amount to \$1,860 per employee. This fiscal impact calculation assumes each employee works an average of five hours daily (or 915 hours annually for 183-day employees). This estimate is calculated as follows:

Total estimated hours worked annually by floater employees (30 employees x 915 hours)	27,450
Hourly rate	\$7.50
Total hourly rate	\$205,875
Multiply by variable benefit rate	x 1.2423
Sub-total	\$255,759
Add fixed benefits (30 employees x \$1,860)	\$55,800
Total annual estimate	\$311,559

Total payments made to substitute workers amounted to \$602,960 in fiscal year 2000. Implementation of this recommendation will result in a cost savings to the district of \$291,401 annually (\$602,960 - \$311,559).

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Hire permanent floater employees to fill absent positions.	\$291,401	\$291,401	\$291,401	\$291,401	\$291,401

Chapter 11

FOOD SERVICE

B. Operations

FWISD maintains a 27,682 square-foot warehouse for the storage of dry food items and cafeteria supplies. Warehouse personnel operate a fleet of eight delivery trucks to keep school cafeterias stocked with food inventory and supplies. Deliveries are made to schools Tuesday through Friday, with only emergency deliveries made on Mondays. **Exhibit 11-3** shows inventory balances for the Nutrition Services Department for 1999 and 2000. As the exhibit shows, the district's inventory balances as of August 31, 2000 totaled \$1,997,677. This included \$1,292,392 of purchased food and non-food items and \$705,285 of government commodities.

Exhibit 11-3
FWISD Nutrition Services Department
Inventory Balances as of August 31, 1999 and 2000

Inventory Item	Inventory Balance 8/31/1999	Inventory Balance 8/31/2000	Percent Increase/ (Decrease)
Government Dry Food	\$207,552	\$369,474	78%
Purchased Dry Food	251,772	313,759	25%
Non-food Supplies	311,272	324,137	4%
Government Frozen Food	357,003	335,811	(6)%
Purchased Frozen Food	542,006	654,496	21%
Totals	\$1,669,605	\$1,997,677	20%

Source: FWISD Central Services Department for the years indicated.

Storage of frozen food items is contracted to a private company. District drivers pick up frozen food from the food storage vendor and deliver to schools once weekly.

The *Administrator's Reference Manual for the Child Nutrition Programs* published by the TEA states the following regarding use of Food Service funds:

All revenues received by or accruing to the school foodservice must be used only for the operation and improvement of the foodservice program. Revenues include, but are not limited to, receipts from: (1) operations of the lunch and breakfast programs; (2) snack bar and a la carte programs; (3) earnings on investments; (4) other local revenues; and (5) federal and state reimbursement received by or accruing to the school foodservice. Foodservice account funds may not be used for expenditures that are not directly related to the foodservice operation although they may be part of the district's general fund. Any positive balance remaining in the foodservice account at the end of the school year must be carried over to the next school year as a beginning balance in the foodservice account.

Violation of the approved uses of Food Service funds can result in the loss of the district's nonprofit status.

FWISD's Nutrition Services Department has an informal agreement with the district's Central Services Department and Maintenance Operations Department for the management of the Food Service warehouse and for providing cafeteria maintenance functions.

All warehouse employees fall under the direction of the director of Central Services. Employees in the Maintenance Department report to the director of Maintenance and Operations. In return for storage and delivery services from the Central Services Department and maintenance services from the Maintenance and Operations Department, the Food Services budget is charged with a portion of food service warehouse employees' and maintenance employees' salaries and benefits.

FINDING

FWISD does not regularly evaluate the terms of the agreement between the Nutrition Services department and the two departments providing internal services - the Central Services Department and the Maintenance and Operations Department. As a result, the district risks supplementing the service departments' budget with Nutrition Services funds.

Exhibit 11-4 shows the allocation of Central Services and Maintenance and Operations employees' time that is charged to the Nutrition Services fund. Included in this list are 13 vacant positions: one plumber II and 12 delivery personnel.

**Exhibit 11-4
Allocation of Salary and Benefit Charges
To the Nutrition Service Budget**

Position	Percent of
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	Salary and Benefits
Central Services Department:	
Director of Central Services	40%
Warehouse Secretary	75%
Truck Drivers (9)	80%
Truck Driver/Delivery (11)	100%
Truck Driver (2)	75%
Truck Driver	20%
Store Keeper	95%
Store Keeper	70%
Warehouse Foreman	85%
Maintenance and Operations Department:	
Exterminator	100%
Floor/Hardware Technician	100%
Sheet Metal Worker	100%
Appliance Repair Technician II (4)	100%
Plumber II (3)	100%
Electrician II	100%

Source: FWISD Budget Department, January 2001.

Recommendation 117:

Evaluate the warehouse and maintenance operations annually to determine what portion of costs are attributable to Nutrition Services.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The associate superintendent of Non-Instructional Services directs the director of Central Services and the director of Maintenance and Operations to evaluate their respective staff time spent on Nutrition Services functions.	October 2001
2.	The director of Central Services and the director of Maintenance and Operations prepare an evaluation of the services provided to the Nutrition Services Department.	November 2001

3.	The director of Nutrition Services reviews the evaluation and approves it.	December 2001
4.	Based on the prior year evaluation, the associate superintendent of Non-Instructional Services determines the appropriate charges to be made for the current year to the Nutrition Services budget.	Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The district is not using the SNAP POS system's automated payment features which would allow students to enter an identification number into a keypad attached to cafeteria cash registers to receive their free, reduced-price or pre-paid meals. Instead, identification cards are issued to all students. Students are required to present their identification cards that are "swiped" through keypads located at each cashier station as the student exits the cafeteria line.

FWISD issued 33,000 cards at the beginning of the 1999-2000 school year, and replaced an additional 26,000 lost cards during the year or 150-200 cards daily. The Nutrition Services Department estimates that it spends approximately \$4,000 annually for card stock and printing for the identification cards in addition to staff time required for the replacing of cards.

A keypad system ensures student privacy of individual meal plan status. In addition, the keypad system prevents a student from obtaining more than one lunch by tracking the identification numbers by date and meal.

Some critics of the keypad system have said that younger children cannot be expected to remember an identification number. Students in Spring ISD, Smithville ISD, Conroe ISD and Austin ISD have successfully memorize their identification number and district officials report few problems.

Recommendation 118:

Implement the automated payment feature for meals.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The Nutrition Services director, coordinators and field supervisors	June
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	plan meetings with the principals regarding the implementation of the keypad systems in all school cafeterias.	2001
2.	The Nutrition Services director obtains bids and purchases the keypads for the elementary schools.	July 2001
3.	The students begin to key in their identification numbers into the keypad systems.	August 2001

FISCAL IMPACT

There is a one-time cost of \$41,860 for purchasing and installing keypads for elementary schools. However, there are cost savings of \$3,500 per year for card stock and \$500 per year for printing.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Implement the automated payment feature for meals.	\$4,000	\$4,000	\$4,000	\$4,000	\$4,000
One-time cost for purchase of keypads	(\$41,860)	\$0	\$0	\$0	\$0
Net (Cost)/Savings	(\$37,860)	\$4,000	\$4,000	\$4,000	\$4,000

FINDING

FWISD school cafeteria inspection procedures do not meet U.S. Department of Agriculture Child Nutrition program regulations. These regulations require school kitchens to be inspected annually for sanitation by a city, county or state health authority. FWISD school nurses conduct health and sanitation inspections every two months, which is a violation of regulations. Health Department officials from the City of Fort Worth have stated they receive no information from the schools regarding the inspections and that they have been requested in the past by FWISD not to inspect the school kitchens.

The nurses began inspecting cafeterias in the 1960's when school districts could elect to operate without local government regulations and inspections. The nurses are trained by FWISD's Health Services Department and attended a food handler's course at the Fort Worth Health Department. The inspection information is given to the director of Health Services, and information is shared with the director of Nutrition Services. The managers do not receive a copy of the information. In focus groups with the field supervisors, concerns were expressed about the nurses conducting the inspections. Nurses spend 61 hours per month on kitchen inspections. Health Services administration spends 4 hours each month

processing the inspections. Training for nurses consumes 242 hours during the beginning of the school year.

Recommendation 119:

Request that the City of Fort Worth Health Department inspect all FWISD school cafeterias on an annual basis.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The director of Nutrition Services and the director of Health Services meet with the director of the Fort Worth Health Department to discuss the transition.	July 2001
2.	The City of Fort Worth conducts a training session for the central Nutrition Services management, field supervisors and cafeteria managers on the inspection procedures.	August 2001
3.	The field supervisors take the Serv® Safe course of the National Restaurant Association and conduct quarterly inspections of the kitchens. This is not mentioned in the finding.	September 2001
4.	The City of Fort Worth begins regular inspections.	September 2001

FISCAL IMPACT

This recommendation can be met with existing resources.

Chapter 11

FOOD SERVICE

C. Student Meal Participation

Increasing student meal participation is important to a school district not only because a district increases its federal reimbursements for every student who participates in meals, but also because it can ensure that more students receive the nutrition they need to perform well during the school day.

FWISD participates in the National School Breakfast Program (NSBP), National School Lunch (NSLP) Program, Summer Feeding Program, After-School Snack Program and the Donated Commodities Program. The federal government established these programs to provide meal subsidies to school district participants. In order to participate in these programs, schools must serve lunches that meet federal requirements and they must offer free or reduced-price meals to children who qualify. Children from families with incomes at or below 130 percent of the poverty level qualify for free meals while those from families with incomes between 130 and 185 percent of the poverty level are eligible to receive reduced-price meals. FWISD is reimbursed for student lunch and breakfast costs as shown in **Exhibit 11-5**.

Exhibit 11-5
FWISD's Federal Reimbursement Rates
Fiscal Year 2001

Category	Breakfast	Lunch	After- School Snack
Full-priced meal	\$0.21	\$0.19	\$0.05
Reduced-price meal	\$0.82	\$1.62	\$0.27
Free meal	\$1.12	\$2.02	\$0.55
Commodity Assistance	N/A	\$0.15	N/A

Source: Texas Education Agency.

Almost 56 percent of FWISD students regularly buy and eat lunch in the cafeterias, while over 16 percent of students eat breakfast in the cafeterias. **Exhibit 11-6** compares FWISD's breakfast and lunch participation rates to those of its peers. Participation rate is defined as the average number of daily student meals served expressed as a percentage of average daily attendance. As this exhibit shows, when compared to the peer districts,

FWISD ranks second lowest of all the peers for student lunch participation and lowest in student breakfast participation for school year 1999-2000.

Exhibit 11-6
FWISD and Peer District Percentage
Of Average Daily Participation

District	1995-96		1996-97		1997-98		1998-99		1999-2000	
	Breakfast	Lunch	Breakfast	Lunch	Breakfast	Lunch	Breakfast	Lunch	Breakfast	Lunch
Austin	21%	55%	22%	55%	21.5%	56%	21%	55%	20%	52%
Dallas	21%	72%	22%	72%	21.7%	71%	21%	70%	20%	70%
El Paso	18%	57%	17%	58%	17.5%	58%	18%	57%	19%	57%
Fort Worth	18%	53%	18%	55%	17.7%	53%	18%	54%	18%	54%
Houston	18%	49%	17%	45%	18.7%	51%	20%	56%	20%	58%

Source: Texas Education Agency Child Nutrition Programs District Profile

As of September 1, 2000, 46,206 students (57 percent) were eligible for free breakfast and lunch meals, while 5,598 students (7 percent) were eligible for the reduced-price meals. As **Exhibit 11-5** shows, students that pay full price for meals help the district qualify for an additional federal funding of \$0.21 per meal for breakfast and \$0.19 for lunch.

FINDING

Competitive food sales in FWISD school cafeterias are providing poor food choices for students and are affecting the district's cafeteria revenues. Competitive food sales from student groups and vending machines located in school cafeterias are allowed at most secondary schools on a regular basis. Competitive food sales are addressed in the TEA Reference Manual, Section 16.1:

School districts must establish rules or regulations as are necessary to control the sale of foods in competition with foods served under the National School Lunch and School Breakfast programs. Such rules or regulations shall prohibit the sale of foods of minimal nutritional value in the food service area during the breakfast and lunch periods. The restricted foods may be sold, at the discretion of local

school officials, in other areas of the school throughout the school day.

Vending machines are numerous and readily accessible at most secondary schools providing high fat, high sodium, low-protein and very high amounts of simple carbohydrate items that students often eat in place of a nutritious lunch. Vending machines were located in or near all of the secondary school cafeterias that were visited. While a few machines are turned off during lunch periods, most are operating for the duration of meal times and block lunch periods at the secondary schools. **Exhibit 11-7** shows the number of vending machines located in FWISD schools. As the chart in the exhibit shows, FWISD schools have 56 vending machines that regularly provide carbonated beverages, fruit drinks, candy, chips, cakes, cookies and sandwiches.

Exhibit 11-7
Fort Worth ISD Vending Locations and Revenues

Location	Number of Vending Machines
Elementary Schools	21
Middle Schools	22
High Schools	10
Other locations	3

Source: FWISD Nutrition Services Department, October 2000.

In addition, some schools in the district allow student activity groups to sell food items in cafeterias during lunch to raise funds.

A review of operations by school shows that schools that restrict the operation of vending machines during the lunch period have higher revenues. For example, Dunbar High School, with an enrollment of 1,203 students and a restrictive vending machine policy, had revenue from a la carte sales of \$20,520 for the month of September 2000. This equates to \$17 per student. Comparatively, North Side High School had a la carte revenue of \$15,758, or \$10 for each of the 1,580 students enrolled. North Side does not have a policy on vending machines.

Recommendation 120:

Establish rules to control competitive food sales as required by the federal Child Nutrition Program guidelines.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The director of Nutrition Services drafts a competitive food policy	June 2001
2.	The superintendent approves and distributes the policy.	July 2001
3.	The director of Nutrition Services prepares a report showing the lost projected revenue increases associated with implementing the new policy.	July 2001
4.	School principals implement the competitive food policy.	August 2001
5.	The director of Nutrition Services directs field supervisors to monitor all school cafeterias to ensure compliance with the competitive food policy.	Ongoing

FISCAL IMPACT

FWISD earned \$4,970,874 in fiscal 2000 for cafeteria a la carte sales. If implementing a restrictive competitive food policy increases a la carte food sales by 5 percent annually, the district could increase Nutrition Services net revenue by \$17,398 annually. Using an average food and supply cost ratio of 41.7 percent of revenues and an average labor cost ratio of 51.3 percent of revenues for the past four-year period for FWISD, the estimated increase in revenue is calculated as follows:

Total a la carte revenue for 2000	\$4,970,874
Multiply by 5 percent increase	x 0.05
Total estimated revenue increase	\$248,544
Less operating expenses:	
Labor (51.3 percent x 248,544)	(\$127,503)
Food and supplies (41.7 percent x 248,544)	(\$103,643)
Net estimated increase in revenue	\$17,398

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Establish rules to control competitive food sales as required by the Child Nutrition programs.	\$17,398	\$17,398	\$17,398	\$17,398	\$17,398

FINDING

FWISD is not maximizing participation in its school lunch program. As shown in **Exhibit 11-6**, the district has a 17.8 percent participation rate in its districtwide breakfast program and 54.2 percent participation in its lunch program. These percentages are lower than FWISD's peer districts for the 1999-2000 school year breakfast program; FWISD is second lowest in the lunch program.

Barriers to participation in FWISD school meal programs include long lines, lack of variety in menus, non-optimal food quality, facility inadequacies that prohibit sale of some items and vending machine competition. Additionally, there is no appropriate signage enabling students to make selections while they wait in line.

Breakfast participation in the district is affected by the breakfast serving times. In focus group discussions, many students commented that they did not have enough time to eat breakfast.

Public school directors are under pressure to maintain a financially healthy bottom line, offer low cost meals and ensure compliance of nutrition standards. In observations, students in the intermediate schools purchased snacks and omitted nutritious food choices. In the high schools, students were observed to have similar practices as well as going outside the cafeteria to purchase soft drinks or meals.

Wimberley ISD introduced a la carte food combinations that qualified as a reimbursable meal during the 1998-99 school year. WISD was the first of its peers to qualify its a la carte lunch line for NSLP reimbursement. Examples of a la carte menu items qualifying as reimbursable meals are vegetables, fruits, Frito pies and milk.

In the schools with a higher percentage of free and reduced-price eligible students, different meal combinations can allow for a Type A meal which is eligible for reimbursement since it contains the right combination of meats, vegetables and the like, and will increase therefore participation. Box lunches or kiosk carts that include the Type A reimbursable meal components have been successfully used as an option.

In Child Nutrition, News for School Food Service Foodservice Professionals published by the TEA, recommendations for merchandising menus such as using space-age descriptions are suggested as ways to entice students. Examples are Warp Speed Chicken Nuggets and Neptune Nuggets for fish. Menu items such as carrot and celery sticks with low fat ranch dressing, toasted ham and cheese sandwiches, vegetable lasagna, chicken fajita wraps and fish burgers are other suggestions.

Peer districts such as Austin and Houston have implemented ethnic food choices, theme days, grab-and-go sack lunches and blue-plate specials to increase participation.

In the secondary schools, "second breakfast" programs, "grab and go breakfasts," and additions of new menu items could increase breakfast participation. Austin increased breakfast participation significantly by having a sack breakfast cart. Fort Bend ISD is offering sack breakfasts to students to increase their school breakfast participation.

Other districts have implemented a universal breakfast program. A universal breakfast program is a program that provides breakfast to all students without consideration of economic status; the district to claim all of the meals for federal reimbursement. For instance, in the Philadelphia school system, the universal program serves meals without charge to all students in designated schools. The experiment has proven successful in a city where 71 percent of the students qualify for free and reduced-price breakfasts and 9 percent for reduced-priced meals.

In addition to adding programs to increase breakfast participation, FWISD should evaluate serving times to determine whether different times could improve participation. In Austin ISD, for example, one elementary school extended the time for breakfast so that each child came through the line at breakfast and was greeted by the principal or assistant principal. Participation was increased by 30 percent and each child was given the opportunity to consume an adequate breakfast and optimize their receptivity for learning.

Recommendation 121:

Increase student meal participation in FWISD cafeterias.

There are a variety of ways that the district can address low student participation. These include:

- Providing a la carte food items that qualify as a reimbursable Type A lunch;
- Locating food kiosks in various locations throughout the cafeteria areas to cut down on long lines;
- Expanding menus;
- Improving the marketing of food items;
- Changing breakfast serving times to increase participation rates;
- Offering "second breakfasts";
- Offering "grab-and-go" breakfasts; and
- Offering universal breakfasts.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The Nutrition Services director develops a plan to increase participation. The plan includes programs such as food kiosks, grab-and-go meals and universal programs.	October 2001
2.	The coordinator of Field Operations and the field supervisors develop menu strategies to support the plan.	December 2001
3.	The director of Nutrition Services presents the plan to school principals and markets it to students.	February 2002
4.	The director of Nutrition Services implements the plan.	August 2002

FISCAL IMPACT

The district can expect to increase participation in both full-priced Type A meal purchases and a la carte sales with the implementation of this recommendation.

FWISD served 1,643,000 full-priced meals during school year 1999-2000 and had \$4,970,874 in a la carte food sales for the same period. If the Nutrition Services Department could increase participation in the full-priced Type A meal category by 5 percent and increase a la carte food sales by 2 percent by implementing this recommendation, the total revenue increases would be as follows:

Type A Meals:		
Number of full-priced Type A meals sold for school year 1999-2000	1,643,000	
Multiply by 5 percent increase	x 0.05	
Increased number of full-prices meals served	82,150	
NSLP subsidy	.21	
Total revenue increase from Type A meals	\$17,252	
Less operating expenses:		
Labor (51.3 percent x \$17,252)		(\$8,850)
Food and supplies (41.7 percent x \$17,252)		(\$7,194)
Total operating expenses	(\$16,044)	
Net revenue increase from Type A meals		\$1,208

A La Carte Sales:		
Total a la carte revenue for school year 1999-2000	\$4,970,874	
Multiply by 2 percent increase	x 0.02	
Total revenue increase from a la carte sales	\$99,417	
Less operating expenses:		
Labor (51.3 percent x \$99,417)		(51,001)
Food and supplies (41.7 percent \$99,417)		(41,457)
Total operating expenses	\$92,458	
Net revenue increase from a la carte sales		\$6,959
Total estimated net revenue increase		\$8,167

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Increase student meal participation in FWISD cafeterias.	\$0	\$8,167	\$8,167	\$8,167	\$8,167

Chapter 11

FOOD SERVICE

D. Financial Management

FWISD's Food Services operations are accounted for in an enterprise fund. Revenues of the fund are derived primarily from charges to users and from federal child nutrition programs under which amounts are received by grant and by receipt of commodities from the United States Department of Agriculture (USDA).

For 2001, FWISD Nutrition Services Department has an annual operating budget of \$21.7 million. **Exhibit 11-8** shows the department's budget for fiscal year 2001. The department receives the majority of its revenues from the federal Child Nutrition Program, which accounts for 74.4 percent of revenues from all sources. **Exhibit 11-9** presents a statement of revenues expenses and changes in retained earnings for fiscal years 1997 through 2000. Total food service revenues increased by less than 1 percent from fiscal year 1999 to 2000, yet operating revenues were up by over 7 percent for this same period. As a result, for the first time since 1997, the FWISD nutrition services program had a net loss of \$565,981. The most significant expenditure increase was related to payroll costs, which increased by over \$1 million, or almost 9 percent between 1999 and 2000. This was due mainly to a 9 percent salary and wage increase given to cafeteria workers in 2000. Other large expenditure increases include depreciation expense, which almost doubled from 1999 to 2000 from \$365,891 to \$698,468. This was a result of the addition of new school cafeterias and upgraded food service equipment.

Exhibit 11-8
FWISD Nutrition Services Budget
Fiscal 2000 and 2001

Description	Fiscal 2001	Fiscal 2000	Increase/ Decrease
Revenues			
Local Revenue	\$5,040,200	\$5,235,025	\$194,825
State Revenue	278,000	300,000	22,000
Federal Revenue	16,600,000	17,037,000	437,000
Total Revenues	\$21,918,200	\$22,572,025	\$653,825
Budgeted Expenditures			

Payroll	\$11,101,400	\$11,949,600	\$848,200
Contracted Services	415,700	1,350,500	934,800
Supplies	9,747,000	9,876,000	129,000
Other	3,000	3,000	0
Depreciation Expense	455,000	400,000	(55,000)
Total Budgeted Expenditures	\$21,722,100	\$23,579,100	\$1,857,000
Operating Transfer to Bond Program	3,300,000	0	(3,300,000)
Beginning Retained Earnings (9/1)	\$11,607,541	\$8,503,641	\$(3,103,900)
Profit/(Loss)		(\$992,925)	
Ending Retained Earnings (8/31)	\$8,503,641	\$7,496,566	\$(1,007,075)

Source: FWISD budget document, August 2000.

Exhibit 11-9
FWISD Nutrition Services
Statement of Revenues, Expenses and Changes in Retained Earnings
For Fiscal Years 1997 Through 2000

Description	1997	1998	Percent Change 1997-1998	1999	Percent Change 1998-1999	2000	Percent Change 1999-2000
Operating Revenues							
Local and Intermediate Sources	\$4,750,350	\$4,715,067	(0.7)%	\$4,984,522	5.7%	\$5,070,221	1.7%
Total Revenues	\$4,750,350	\$4,715,067	(0.7)%	\$4,984,522	5.7%	\$5,070,221	1.7%
Operating Expenses							
Payroll Costs	10,494,786	10,695,018	1.9%	11,324,973	5.9%	\$12,332,381	8.9%
Professional and	343,439	444,082	29.3%	340,937	(23.2)%	\$314,229	(7.8)%

Contracted Services							
Supplies and Materials	8,773,317	8,743,094	(0.3)%	9,368,086	7.1%	9,588,193	2.3%
Other Operating Costs	984,490	446,455	(54.7)%	2,632	(99.4)%	2,410	(8.4)%
Depreciation	0	446,445	100.0%	365,891	(18.0)%	698,468	90.9%
Total Expenses	\$20,596,032	\$20,775,104	0.9%	\$21,402,519	3.0%	\$22,935,681	7.2%
Operating Income/(Loss)	\$(15,845,682)	\$16,060,037	1.4%	\$(16,417,997)	2.2%	\$(17,865,460)	8.8%
Non-Operating Revenue							
Interest Income	301,410	408,017	66.4%	388,445	(4.8)%	369,478	(4.9)%
State Matching and Other	292,448	287,265	34.4%	269,794	(6.1)%	278,936	3.4%
Child Nutrition Program	16,306,787	15,748,069	(1.4)%	16,689,503	6.0%	16,651,065	(0.2)%
Total Non-Operating Revenues	\$16,900,645	\$16,443,351	0.4%	\$17,347,742	5.5%	\$17,299,479	(0.3)%
Net Income/(Loss)	\$1,054,963	\$383,314	(13.6)%	\$929,745	142.6%	\$(565,981)	(160.9)%
Operating Transfer Out	0	0	0.0%	0	0.0%	(3,300,000)	100.0%
Beginning Retained Earnings - (9/1)	\$8,793,064	\$9,848,027	12.0%	\$10,677,796	8.4%	\$11,607,541	8.7%
Ending Retained Earnings (8/31)	\$9,848,027	\$10,231,341	9.3%	\$11,607,541	13.5%	\$7,741,560	(33.3)%

Source: FWISD Comprehensive Annual Financial Reports for the years indicated.

The Texas Education Agency's Financial Accountability System Resource Guide (FASRG) requires that schools participating in the Child Nutrition Program operate a nonprofit Food Service program. As a result, school districts are not allowed to accumulate balances in the Food Service fund balance account in excess of three month's normal operating costs.

Exhibit 11-10 shows that FWISD has exceeded this threshold for fiscal years 1997 through 2000. The excess fund balance has decreased, however, from \$6.2 million in 1999 to an excess of just over \$2 million in 2000.

Exhibit 11-10
FWISD Nutrition Services Department
Fund Balance Compared to Operating Expenditures
Fiscal Years 1997-2000

Description	1997	1998	1999	2000
Annual Operating Expenditures	\$20,596,032	\$20,775,104	\$21,402,519	\$22,935,681
Monthly Operating Expenditures (divide by 12)	\$1,716,336	\$1,731,259	\$1,783,543	\$1,911,307
Operating Expenditures for 3 Months (Monthly expenses multiply by 3)	\$5,149,008	\$5,193,777	\$5,350,629	\$5,733,921
Ending Fund Balance	\$9,848,027	\$10,231,341	\$11,607,541	\$7,741,560
Excess Fund Balance	\$4,699,019	\$5,037,564	\$6,256,912	\$2,007,639

Source: FWISD Comprehensive Annual Financial Reports for the years indicated.

In a letter written in January 1998, the director of Nutrition Services requested and received permission from the TEA to maintain excess fund balance reserves for capital investments of large and small equipment for 12 new schools and to renovate equipment in 33 older schools.

FINDING

The Nutrition Services Department uses its own computer program to track profit and loss and some elements of productivity in their cafeterias. A "break even" report is distributed to all cafeteria managers. An example of a report is included in **Exhibit 11-11**. The report shows the breakdown of cafeteria revenue versus expenses by category. In this particular exhibit, the school showed net revenue.

Exhibit 11-11
FWISD Nutrition Services Department
Break-Even Report
Carter-Riverside High School

Revenue	Amount	Percent of Revenue	Expenditures	Amount	Percent of Revenue	Fixed Costs	Variable Costs
School Food Service Activity	\$15,492	54.5%	Kitchen (payroll & benefits)	\$13,351	47.0%	\$13,351	N/A
School Breakfast Program	\$1,357	4.8%	Food	\$2,421	8.5%	N/A	8.3%
National School Lunch Program	\$10,101	35.6%	Non-food	\$233	0.8%	N/A	0.8%
USDA Commodities	\$1,461	5.1%	Telephone	\$0	0.0%	\$0	0
			Indirect costs	\$193	0.7%	\$193	
			Overhead	\$2,899	10.2%	\$2,899	
TOTAL	\$28,411	100%	TOTAL	\$19,096	67.21%	\$16,442	9.3%
Break Even Point	\$18,137						

Source: FWISD Nutrition Services Department, October 2000.

A review of the break-even reports from September 2000 showed 105 schools exceeded the break-even point and 17 schools failed to meet the break-even point. Of those schools that did not meet the break-even point some were special programs such as Middle Level Learning Center and Metro Opportunity. Most significant was Pascal High School that had revenues of \$17,238, and expenditures of \$17,462. Northside High School

had \$42,193 in revenues and \$20,644 in expenses. All other FWISD secondary schools exceeded the break-even point.

COMMENDATION

The Nutrition Services Department has developed an innovative financial reporting tool that will allow it to concentrate on profitability of individual cafeterias.

FINDING

Federal regulations require a standardized recipe for menu items containing more than one ingredient. Ninety-five percent of the foods prepared within the district require a recipe. In order to save time spent on the manual conversion of recipes for various sizes of student populations and demand, Nutrition Services has developed a computerized program that is used by each cafeteria manager. The recipe program performs all measurement conversions needed, which minimizes error and food waste and helps ensure food product consistency. The program saves approximately 40 minutes per day per school in cafeteria manager time, decreasing the average time needed for recipe conversion from 45 minutes per day to 5 minutes per day, thus saving a cumulative 14,000 hours during the school year for the 120 schools in which food is prepared. The program is flexible and allows changes to ingredients and recipes, while centralizing control. As a result, the program has saved \$207,200 per year in reduced cafeteria manager time since its inception in 1997, in addition to cost savings achieved by decreased food waste, increased food product consistency and decreased preparation time and employee labor.

COMMENDATION

The Nutrition Services Department has increased the productivity of its cafeteria managers and decreased food waste by using a standardized recipe program.

FINDING

Duplicative data entry of Nutrition Services financial data into the district's main accounting system creates unnecessary work for district staff. The SNAP system is used by Nutrition Services to account for all cafeteria receipts and to track inventory transactions. An accountant in the Nutrition Services department oversees the SNAP system to ensure the integrity and accuracy of food service operations.

All revenue and inventory data maintained in the SNAP system is duplicated in the main CIMS III computer system that the district has used

since 1990 through manual re-keying of data. An accounting clerk in the Accounting Department is responsible for keying detailed sales and inventory data from SNAP reports into the district's main general ledger. The accounting clerk is also required to verify and reconcile the SNAP system data against the data entered into CIMS III to ensure data accuracy.

Recommendation 122:

Eliminate the duplicative entry of Nutrition Services financial data into the district's main accounting system.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The director of Nutrition Services meets with the director of Accounting to discuss streamlining the food services accounting function.	December 2001
2.	The director of Nutrition Services submits monthly reports to the Accounting Department.	Ongoing
3.	The director of Accounting instructs the food services accounting staff to entry only summarized food services data.	February 2002
4.	The Accounting Department staff reconciles the CIMS III system to the SNAP system monthly.	Ongoing

FISCAL IMPACT

This recommendation can be accomplished with existing resources.

Chapter 11

FOOD SERVICE

E. Child Nutrition Education

The American Dietetic Association, the Society for Nutrition Education and the American School Food Service Association have developed a position statement outlining the need for comprehensive school-based nutrition programs and services for all the nation's elementary and secondary students.

It is important to evaluate the role that school meals play in helping students learn more effectively while improving their immediate and eventual health. There is consensus that school food and nutrition programs are important to learning readiness, health promotion and disease prevention. Childhood obesity has become the third most prevalent disease of children and adolescents in the United States. Many large districts view school meals as an integral part of the total education process and allocate money to ensure quality and maintain affordability. Policy decisions are increasingly being made with the goal of providing all students the skills and environment they need to adopt healthy eating and dietary behaviors.

The School Meals Initiative mandates that FWISD meet the nutrient standards established by the USDA for fat and energy (caloric) content. The same initiative encourages child nutrition services departments to participate directly in nutrition education and team nutrition programs.

FINDING

A Fort Worth pediatrician has begun to screen and quantify the problems of overweight and obesity and their corresponding risks for developing Type 2 Diabetes Mellitus among children in 17 FWISD elementary schools. Of the 1,500 fifth grade children that have been screened, 20 percent have been found to be at risk for Type 2 Diabetes and 20 percent had higher than normal blood pressures. The Nutrition Services Department has supported the project by identifying healthy foods and modifying some menus.

COMMENDATION

The Health Services and Nutrition Services Departments are participating with a pediatrician to screen and identify children at risk for obesity and diabetes.

Chapter 12

SAFETY AND SECURITY

This chapter reviews the safety and security of the Fort Worth Independent School District in three parts:

- A. Security Operations
- B. Safety
- C. Student Discipline Management

With recent events involving school violence, school districts realize that they must provide a safe and secure environment for their students and employees. Developing safe schools is a community effort requiring cooperation among school districts, parents, and municipal and county governments. Providing a safe school requires developing comprehensive policies, procedures and programs that include elements of prevention, intervention, and enforcement. Discipline management and alternative education programs are key tools in this process.

BACKGROUND

FWISD, the fourth largest school district in the state of Texas, is located in north central Texas in urban Tarrant County. FWISD falls within three different law enforcement jurisdictions: the Fort Worth Police Department (FWPD), the Benbrook Police Department and the Tarrant County Sheriff's Office. The review team obtained crime data from the Texas Department of Public Safety to gauge the level of crime and violence in the immediate district area. As **Exhibit 12-1** shows, the crime rate in Tarrant County decreased between 1996 and 1999, although it is still above the state average.

Exhibit 12-1
Crime Rate Comparison: Tarrant County to State Average
1996-99

Crime Rate Per 100,000 Population	1996	1997	1998	1999
Tarrant County	6,312.9	5,776.3	5,592.5	5,651.0
State of Texas	5,708.3	5,478.2	5,110.7	5,035.2

Source: Texas Department of Public Safety Uniform Crime Reports 1996-99

The Texas School Performance Review (TSPR) published *Keeping Texas Children Safe* in June 1998. The publication is based on the results of its numerous school performance reviews. TSPR found that the most effective districts have a safety plan that includes prevention, intervention and enforcement strategies. Effective programs include the steps shown in **Exhibit 12-2**. School districts applying these measures in a comprehensive system get significant results.

Exhibit 12-2
Keeping Texas Children Safe in School
January 2000

Strategy	Steps to Be Taken
Prevention	Know your goals and objectives: where your district is going and what you want to accomplish.
	Establish clear expectations for students, parents, teachers and administrators.
	Address warning signs before they turn into trouble.
Intervention	Look for trouble before it finds you.
	Recognize trouble when you see it.
	Have individuals in the right place and at the right time to intervene.
	Have a plan of action appropriate for the occasion and practice it.
Enforcement	Leave no room for double standards.
	Ensure that discipline management extends inside and outside the classroom.
	Alternative programs are not just a matter of compliance with the law; they are many students' last chance at success.

Source: Comptroller of Public Accounts, *Keeping Texas Children Safe in Schools*, January 2000.

Student and school employee safety is a major concern. The Texas Legislature is assisting the safe-school effort by legislating a number of safety and accountability standards for Texas schools (**Exhibit 12-3**).

Exhibit 12-3
Major School Safety Initiatives of the Texas Legislature
1993-99

Legislation	Summary
1993 Legislature	
House Bill 23	Required information-sharing between law enforcement and schools on student arrests for serious offenses; required school principals to notify law enforcement if criminal activity occurs or is suspected of occurring on school grounds.
Senate Resolution 879	Encouraged collaboration between the Texas Education Agency and Department of Public Safety in the recording of criminal incidents in the schools.
House Bills 633 and 634	Outlined the commissioning and jurisdiction of peace officers for school districts.
House Bill 2332	Authorized the State Board of Education to establish special-purpose schools or districts for students whose needs are not met through regular schools.
Senate Bill 16	Defined drug-free zones for schools.
Senate Bill 213	Created the safe schools checklist.
Senate Bill 155	Created the Texas Commission on Children and Youth.
1995 Legislature	
Senate Bill 1	Revamped the Education Code and laws on safety and security in schools, including the requirement for districts to establish alternative education programs and, in counties with populations above 125,000, to establish juvenile justice alternative education programs.
1997 Legislature	
Senate Bill 133	Rewrote the safe schools provision of the Education Code.
1999 Legislature	
Senate Bill 260	Allowed the expulsion of a student who assaults a school district employee
Senate Bill 1580	Created the Texas Violent Gang Task Force.

Senate Bill 1724	Required each school district to annually report (beginning with 1999-2000) the number, rate and type of violent and criminal incidents occurring in each school, and allowed them the option of including a violence prevention and intervention component in their annual school improvement plans.
Senate Bill 1784	Allowed school districts to use private or public community-based dropout recovery education programs to provide alternative education programs.
House Bill 152	Made the act of placing graffiti on school property a state jail felony.
House Bill 1749	Encouraged school districts and juvenile probation departments to share information on juvenile offenders.

Source: Compiled by TSPR, 1999.

These legislative changes require school districts to adopt a student code of conduct with the advice of a district-level committee. Students who engage in serious misconduct must be removed from regular education settings and placed in disciplinary alternative education programs. Specific information about the arrest or criminal conduct of students must be shared between law enforcement and local school districts. In counties with a population of 125,000 or more, school districts, the juvenile board and juvenile justice systems must establish a Juvenile Justice Alternative Education Program (JJAEP). The JJAEP is under the jurisdiction of the Texas Juvenile Probation Commission and provides for the education of incarcerated youths and youths on probation.

Chapter 12

SAFETY AND SECURITY

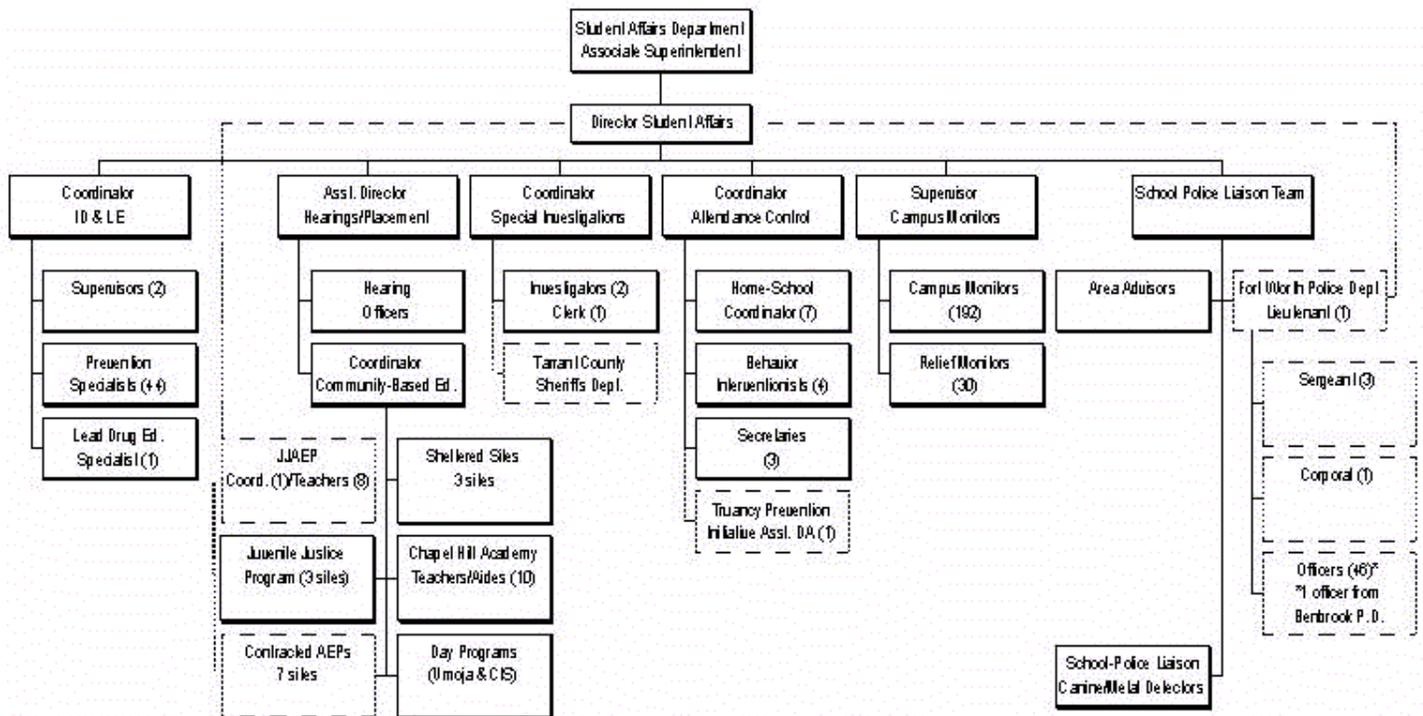
A. Security Operations

According to U.S. Department of Justice report *Security Concepts and Operational Issues*, security operations often require a balance between effectiveness, affordability and acceptability. Frequently, schools do not have the funding for an aggressive and complete security program. Many effective measures are too expensive. School districts can provide effective security operations without applying every security approach at every school. Effective security operations are based on a determination of who or what needs to be protected, who or what they or it needs to be protected from and the general constraints of the particular school's facilities.

FWISD concentrates its safety and security activities in the Student Affairs department. As shown in **Exhibit 12-4**, the Student Affairs department maintains six functional areas: Improvement of

Discipline and Learning Environment (ID&LE), Hearings and Placement, Special Investigations, Attendance Control, School Monitors and the School Police Liaison Team.

Exhibit 12-4
Organization of Student Affairs Department



[] Non-District Personnel. Partnerships with various entities.

Source: Fort Worth Independent School District Department of Student Affairs 2000-2001 Handbook and FWISD director of Student Affairs.

The ID&LE unit has a staff of 47 and is headed by the coordinator for ID&LE. This office provides prevention specialists to each secondary school. The specialists provide education, counseling, training and other services to students, parents and staff. The unit is also responsible for meeting Safe and Drug Free Schools (SDFS) drug intervention education requirements.

The Hearings and Placement unit supervisor is also the assistant director of the Student Affairs department. Five hearings officers and four clerks conduct disciplinary hearings and make referrals to alternative education programs. The unit also has a coordinator for the after-school program, and an employee on special assignment that monitors contract compliance of the district's disciplinary alternative education program contracts. Two additional program monitor positions included in the design of the after-school program are not yet active.

The Special Investigations unit, headed by the coordinator of Special Investigations, consists of three full time investigators, one clerical support position and a part time investigator. Based on 1999 figures, the coordinator of Special Investigations estimated that on average, the investigations staff fingerprints 2,994 employee applicants and 1,840 volunteers per year, checks the criminal histories of 23,000 employees per year, evaluates 1,442 criminal histories and conducts 643 employee investigations for allegations ranging from criminal misconduct to inappropriate behavior towards a child.

Attendance Control coordinates the Truancy Prevention Initiative, monitors attendance, and holds truants for parent pick-up. The unit has seven home-school coordinators and four behavior interventionists who make home visits and provide intervention services to students at risk of dropping out of school. Three secretaries prepare and send warning letters to parents of students who are truant and prepare court paperwork for filing criminal violations of state attendance law.

The School Monitor unit has 192 monitors and approximately 30 part-time relief monitors, providing each school with at least one monitor. Schools with increased security risks are assigned additional monitors. According to the school-monitor handbook, monitors assist in maintaining a secure environment at school and school-sponsored activities by screening visitors; locating and patrolling potential trouble areas on campus; supervising bus loading and unloading; patrolling the parking lot, restrooms and lunch room; and checking hall passes. Monitor training programs are held five times a year. Monitors receive training in basic first aid, dispute resolution and district procedures.

FWISD has a long-standing partnership with the Fort Worth Police Department (FWPD) to provide a safe educational environment through a program called the School Police Liaison Team. The program, started in 1968 with two teams of FWISD employees and one Fort Worth police officer, has expanded to thirteen school teams, one lieutenant, three sergeants, one corporal and 46 officers. The district has one school located in the city of Benbrook. A Benbrook police officer is assigned to that school. The unit also coordinates security for after-hours school-related events such as athletic events, school plays and district meetings. FWISD budgets \$2.5 million for after-hours security.

On March 4, 1995, 58.7 percent of the voters approved the creation of the Fort Worth Crime Control and Prevention District (CCPD). The CCPD, implemented October 1, 1995, was due to expire September 30, 2000. Voters renewed the district May 6, 2000 by a three-to-one margin (78.9 percent approval). The CCPD has taxing authority and collects a one-half cent sales tax to fund law enforcement initiatives. CCPD must renew every five years with voter consent.

CCPD funding significantly helped the initial school police liaison program grow into the current School Security Initiative (SSI). FWISD receives CCPD funding assistance for two initiatives: the School Security Initiative (SSI) and the After School Program initiative. The SSI is headed by a police lieutenant and currently has 51 assigned peace officers. FWISD and the FWPD share officer personnel costs on a 50/50 basis. The CCPD fiscal year 2001 budget for SSI is \$3.6 million, and the 2002 budget is \$3.8 million. The CCPD budget does not include the funding provided by FWISD toward the joint city-district safe-school initiatives.

The district also receives Texas Education Agency grant funding for Safe and Drug Free Schools (SDFS). The funding received by FWISD also supports programs at 16 area private schools. FWISD uses the approximately one-million-dollar SDFS grant to sponsor the cost of school activities and to fund one supervisor, prevention specialists and a secretary. The district budgets 14 middle schools and ten high schools in the SDFS fund. Approximately 88 percent of SDFS funds are allocated to payroll and 8 percent to operating costs and activities. The remaining 4 percent is allocated to contract services, supplies and material costs.

The district provides a variety of prevention programs. **Exhibit 12-5** outlines the FWISD programs for creating a safe educational environment.

Exhibit 12-5
FWISD Safety and Security Programs

Program	Purpose	Service Area
School Security Initiative also known as School Police Liaison Team	Enhances student safety and security by providing school police officers and school surveillance equipment.	Officers are in high schools, middle schools, 6 th grade centers and designated DAEPs. Surveillance equipment was placed in all secondary schools and on all school buses.
After School Program Initiative	Addresses learning and social skills needs of "latch-key" students.	51 schools in identified crime and poverty-burdened neighborhoods.
Truancy Initiative	Targets truancy efforts in areas of high absenteeism.	36 schools (five pyramids) targeted based on truancy data.
Because We Care	School-based counseling for anger management and conflict resolution.	Available to all schools.
ACCESS	After-school behavior-intervention program for self-esteem and responsibility.	Available to secondary schools.
Shelter and Treatment Program services	Provides education services to shelter programs and treatment programs serving youth.	Women's Haven, the Bridge, the Assessment Center and Tarrant Youth Recovery Campus.
Peer Mediation/Conflict Resolution	Peer mediation programs for elementary, secondary and	Elementary and Secondary Schools and Community Groups.

	community implementation for development of conflict resolution skills.	
D.A.V.E.: Drug & Violence Interactive Mediation	Drug and violence education/prevention curriculum.	Grades K-12.
True Colors	Personality/personal style identification, communication skills, leadership development.	Schools and community groups.
McGruff	Safety and drug education.	Grades K-3.
Second Step	Violence prevention.	Grades pre-K - 8.
Skillwise/Botvin's Life Skills Training	Life skills and violence prevention training.	Grades 6-8.
Allied Peer Helpers/ Natural Helpers	Peer support network; peer helping model.	Grades 6-12.
Parent to Parent	Parent education/parenting training.	Parents and other care givers.
Workplace of Difference	Cultural awareness, prejudice reduction.	Staff, community organizations.
Understanding and Affirming Human Diversity/Welcoming Diversity	Prejudice reduction	Grades 9-12, teachers, administrators, support staff, parents
Department of Transportation Training	Drug and alcohol training, drug testing, communication and conflict resolution skills training	Bus drivers and other safety sensitive district staff

Source: Interviews and program description documents provided by FWISD Student Affairs department.

FINDING

FWISD has developed active partnerships with the Fort Worth and Benbrook Police Departments to address and prevent its school crime instead of funding an internal school district police force. These partnerships are more cost-effective for FWISD in a number of ways. The district has full access to a greater number of specialized police department units and equipment, such as SWAT teams and helicopters to respond to emergencies without having to fund these items.

Fort Worth has a unique funding structure for crime reduction initiatives. In 1989, legislation was passed authorizing Tarrant County to call for an election to create a crime-control district. House Bill 22 amended this legislation in 1993 allowing municipalities in counties with a population of one million or more to create a crime-control district, again through an election process. The legislation requires that a two-year Crime Control Plan, including a comprehensive plan with measurable goals and objectives,

and a two-year budget be adopted by a temporary board of directors and that the major points of this plan be available to the voters before they go to the polls. **Exhibit 12-6** presents the elements of the Fort Worth Crime Control Plan.

Exhibit 12-6
Crime Control and Prevention District Plan Elements

Element	Description
Mission	To promote an enhanced feeling of safety for all citizens in all areas of the city including neighborhoods, commercial areas, parks, and public facilities.
Vision	To make Fort Worth, Texas the safest major city in the United States.
Initial Plan Goals (1995)	<ol style="list-style-type: none"> 1. To reduce reported Part I Crime by an average of 10 percent throughout the 5-year Crime Control District cycle, for a total decrease of 50 percent by the end of the year 2000. 2. To reduce citizen fear of crime. 3. To increase citizen participation in the CODE BLUE program. 4. To buttress the crime-fighting tools of the FWPD through acquisition of equipment and new technology. 5. To enhance the recruitment of high quality officers and retain those in whom the city has already invested. 6. To provide a secure environment in which children can receive an education.
Revised Plan Goals (2000)	<ol style="list-style-type: none"> 1. To attain a crime rate of 6,227.03 Part I crimes per 100,000 of population. 2. To reduce the criminal rate of Fort Worth among major cities to 30th. 3. To increase citizen participation in the CODE BLUE program. 4. To support the operations of the police department through the acquisition of equipment, technology and the retention and recruitment of high quality officers. 5. To continue to embrace a focus on prevention by the community and the police department. 6. To provide a secure environment in which children can receive an education.

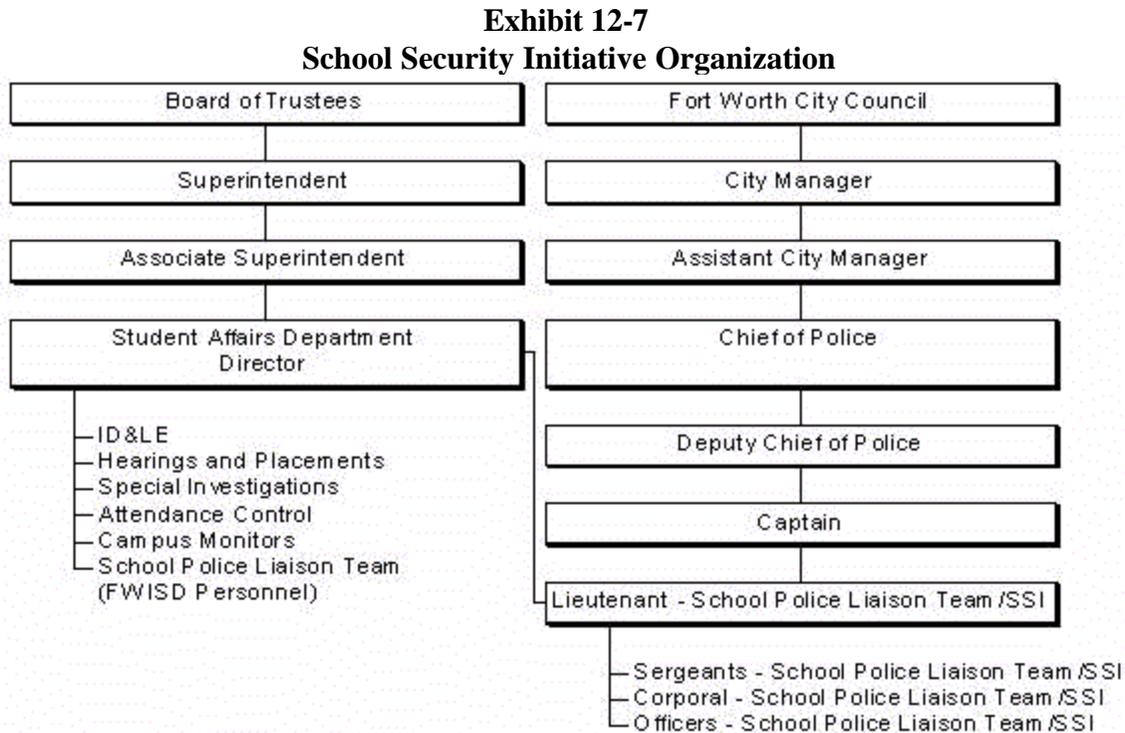
Source: Internet Documents <http://ci.fort-worth.tx.us/police/communit.htm> and <http://ci.fort-worth.tx.us/police/CCPD/index.htm>

The district pays 50 percent of the officer personnel costs, with the other 50 percent funded by the crime prevention district. The police department pays operating and capital equipment costs for items needed by the officer such as uniforms, guns, training, vehicles and radios. Student safety and security is also increased by the presence of trained enforcement officers at school.

The second initiative funded by the CCPD is a new initiative, the after school-program. National research has shown that on school days during the hours of 3:00 p.m. to 6:00 p.m., adolescents are at a higher risk of being crime victims or committing a criminal act than at any other time. Recognizing this,

a multi-disciplinary task force of city officials, school district personnel and related service providers developed a plan to implement a coordinated program targeting schools throughout the city that have documented juvenile crime problems. This program includes activities such as academics, arts and athletics. The 2001 and 2002 budgets for this initiative are \$1.4 million, which includes funding to the Benbrook school district. The district provides an additional \$1.1 million to complete the program funding.

Exhibit 12-7 presents the School Security Initiative organization chart.



Source: Fort Worth Independent School District Department of Student Affairs 2000-2001 Handbook, FWISD director of Student Affairs and Internet document <http://ci.fort-worth.tx.us/police/mission.htm>.

Each school police liaison team consists of a district area advisor and a police officer from the SSI unit. The area advisor is a trained counselor or teacher and acts as a liaison between the various levels of administration and staff responsible for student discipline and school safety. Area advisors carry radios to monitor transmissions and incidents involving campus monitors. They are assigned a vehicle and travel between elementary, middle and high schools to provide continuity of care as students move forward in their education.

The position acts as a facilitator between the independent responsibilities of the school and of the enforcement officer. The district funds the 14 area advisors as part of the commitment to the school police liaison team.

COMMENDATION

FWISD has developed an innovative, cost-effective approach to address school safety and security through partnerships with the Fort Worth and Benbrook Police Departments.

FINDING

FWISD aggressively investigates employees before and after hiring to prevent or limit the risk of employee criminal misconduct. The Student Affairs department's Special Investigations unit includes district investigators and a Tarrant County Sheriff's Deputy who performs criminal history checks. Every prospective employee or volunteer's background is checked for local, state or national criminal history. Each year, every employee's background is rechecked for new criminal complaints. Combining the sheriff's deputy with the district's investigations unit provides efficient access to the county's criminal history database. The district's large volume of criminal history information requests has qualified the district for a direct link to the Texas Department of Public Safety's electronic fingerprint database. The direct link will expedite the background check process.

COMMENDATION

FWISD's program to investigate applicants', employees' and volunteers' backgrounds for criminal history prevents potential problems from becoming complaints.

FINDING

The district does not have a comprehensive long-range safety and security planning process to clearly outline a strategic direction for its Student Affairs department, administrators, teachers, staff and Fort Worth police officers engaged in daily safety and security matters. The department has numerous general administrative procedures, but no plan that provides strategic direction. The only safety-and-security-related long-range plan is the initial School Safety Initiative (SSI) program request plan, developed in 1995 and used to seek funding from the CCPD. There is no other long range-planning document to guide the Student Affairs department through the next five years.

As independent agencies, the police department and school district do not routinely meet to coordinate the goals and budgets impacting the School Security Initiative unit. As depicted previously in **Exhibit 12-7**, the police lieutenant who is responsible for supervision of all officers reports to a captain in the FWPD. However, the lieutenant is also required to coordinate security matters with the director of Student Affairs. This unique reporting structure means that while these units serve the same population, they function, plan and budget separately. While there is a high degree of cooperation between the two departments, collaborative planning occurs when the programs and staff are integrated rather than as a result of a comprehensive strategic planning process.

FWISD and the FWPD recently entered into a new contract for the School Security Initiative (SSI) unit but have not made any joint plans to guide the unit through the period of the new contract. Lack of coordinated planning to address long-term issues causes issues to be handled on an informal basis without an identified funding source. With an informal process, important issues may not be addressed or there may be gaps in or duplication of resources. For example, the district may prioritize and staff a truancy program under the expectation that SSI officers remain on school grounds to provide security and emergency response. The police department may also prioritize a truancy initiative to reduce

neighborhood crime and assign SSI officers to truancy duties that take them off school grounds during school hours. Because the two agencies are independent and cannot control each other's goals or strategies, there is a potential for disagreement on initiatives and funding priorities at a critical times.

A strategic plan for district safety and security clearly identifies roles and responsibilities and aligns expectations of administrators, teachers and staff. A plan also provides a guidepost for identifying possible conflicts with other agencies' goals. A comprehensive plan also requires FWISD to look districtwide at all issues rather than rely on individual school plans. Without a plan for funding and reaching safety and security goals, the district initiatives are uncoordinated and at risk from being driven by external agencies rather than by district goals. For example, the district anticipated expanding the SSI program into the elementary schools with funding from a federal grant program available to police agencies. The Fort Worth police chief has decided not to move forward with the grant application, so the district's plan for securing the elementary schools has been temporarily delayed.

The Student Affairs department does not have performance and cost-efficiency measurements necessary to support a planning process. These measures allow administrators, the school board and the public to assess the success of a district program in two ways. Performance measures enable the district to assess whether goals and objectives are being achieved. Cost-efficiency measures enable the district to assess whether goals and objectives have been achieved as economically as is feasible. Without a comprehensive set of performance and cost-efficiency measures for each major program, the district cannot determine if the funding level is appropriate, the services are provided cost effectively as possible, the program should continue, or the program should be outsourced.

Recommendation 123:

Develop a comprehensive long-range districtwide safety and security plan that includes performance measures.

A comprehensive strategic safety and security plan will include the following elements: a mission statement; an assessment of strengths, weaknesses, opportunities and threats; long-term goals; clearly stated, measurable objectives that support achieving the goal; strategies or initiatives that identify how objectives will be met; performance measures and output measures to track progress and effort; resource plans (budgets) linked to each strategy; funding sources and cost sharing roles and responsibilities. Because of the unique relationship with the FWPD and the funding received from the CCPD, the plan should be coordinated with the police department's long-range plans for the SSI. With a comprehensive plan, district level administrators should be able to measure the department's actual performance compared to its planned performance. The measures must be easy to use, easy to understand, inexpensive to implement, and they must link performance to costs.

The district's comprehensive security plan should clearly outline what it wants to accomplish in the areas of safety and security and define the staff's expected responsibilities.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Student Affairs develops a draft long-range safety and security plan consistent with the goals expressed in the district improvement plan and consistent with	July 2001
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	the goals expressed in the CCPD Safety Security Initiative.	
2.	The director of Student Affairs meets with directors of other functional areas to develop a needs assessment for operational safety issues in overlap areas such as operations and transportation. Conflicting, duplicative or competing goals are noted.	July 2001
3.	The director of Student Affairs meets with the associate superintendent to discuss and reach consensus on cross-functional district goals and priorities as noted in the preliminary planning stage.	August 2001
4.	The director of Student Affairs meets with the lieutenant of the SSI unit to develop goals and strategies for the unit in keeping with the approved initial district draft.	September 2001
5.	The director of Student Affairs assigns supervisory staff in each Student Affairs functional area the task of developing strategic initiatives for accomplishing the expressed goals in the initial draft.	September 2001
6.	The director of Student Affairs publishes a final draft document to affected departments for feedback.	October 2001
7.	Student Affairs department supervisors and coordinators develop performance measures, forms for reporting progress and evaluating performance, budget impact statements and possible funding sources for approved goals and strategies.	November 2002
8.	The associate superintendent for Instruction, Area I, presents plan to superintendent and board for approval.	January 2002
9.	The director of Student Affairs publishes approved plans to affected staff.	February 2002

FISCAL IMPACT

This recommendation could be implemented with existing resources.

FINDING

FWISD does not consistently seek expert advice from its School Security Initiative (SSI) unit in making security-related decisions. While collaboration occurs on many projects, such as evaluation and placement of the school security cameras, other projects could benefit from expert safety advice. As one example, the district purchased an old school facility to use as an FWISD school without requesting advice on the traffic patterns and accessibility to the new facility. The FWPD must now provide additional traffic resources to maintain safe neighborhood streets during hours of school operation.

As another example, Student Affairs area advisors are responsible for performing periodic safety reviews at schools. The review is informal, rather than by a developed checklist. The SSI officers are not routinely asked to participate in the safety audit or develop a procedure that can be followed by school staff.

Making use of readily available experts can reduce potential loss for both agencies, and a comprehensive security review developed with security expertise and knowledge of a school's environment can potentially reduce security risks.

Recommendation 124:

Implement procedures to include SSI officers' input on safety reviews and initiatives, incorporating their response into district planning and decision-making.

An effective safety program anticipates and prevents problems, reducing the cost of corrective action. Incorporating safety concepts into building design or renovations can increase security and minimize the need for security devices. A proper review of school safety needs can identify minor problems before they become a major emergency.

Include SSI officers in discussions regarding facility and building design and traffic planning and routing. The officers should also provide advice and expertise in the development and conduct of safety audits. Security needs should be evaluated as additions and improvements are planned, as well as after changes are complete.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	Student Affairs director meets with SSI lieutenant to develop procedures for requesting safety audits, input into safety audit plans or other project-based safety advice.	June 2001
2.	Student Affairs director provides information to affected staff.	August 2001

FISCAL IMPACT

This recommendation could be implemented within existing resources.

FINDING

The district does not have a maintenance and phased-replacement plan for its security equipment. In 1994, the district received funding for 867 surveillance cameras, 490 for secondary schools and 377 for buses, as part of the CCPD School Security Initiative. These cameras were installed over a two-year period, which means some of these cameras are entering their fifth year of service.

Videotapes used in the cameras are recycled. These tapes may be introduced as evidence in hearings and court cases. If there are no requests for the tape as evidence of an incident, the tape is put back into service after one week. The quality of the images is poor, and with no formal maintenance review process, it cannot be determined if the poor quality is the result of tape recycling or cameras wearing out. When cameras break, they are sent to the district's electronic shop for repair. Tapes are purchased from individual school budgets, and the decision to replace them is left to the principal.

Fort Worth ISD also uses metal detectors. There are 100 metal detectors at district middle and high schools, which were purchased in 1996-97 as part of the School Security Initiative. Three trained district employees perform routine maintenance such as replacement of battery packs. The district contracts with the vendor who supplied the metal detectors for all other maintenance such as recalibration or repairs.

In July 2000, the director of Student Affairs requested that the district's security technology be reviewed. A memorandum outlining possible replacements and technology upgrades for the next CCPD funding cycle was presented to the Student Affairs director on October 31, 2000. However, there are no written procedures or guidelines for routine review and replacement of worn equipment based on the condition and maintenance costs of the equipment.

Without a maintenance plan for review, repair and replacement, security devices become inoperable and lose effectiveness. Replacements are made on an emergency basis rather than an anticipated basis. New advances in technology are not implemented because the cost to upgrade an entire system, as opposed to planning periodic replacements, is prohibitive.

Recommendation 125:

Develop a maintenance and phased-replacement plan for security equipment.

A maintenance and phased-replacement plan includes procedures to assess the operability of security equipment and a plan to provide phased upgrades or replacements based on the expected life cycle of the existing device. The plan should include a phased-equipment-replacement schedule that keeps annual costs reasonable and allows older or less effective technology to be reassigned to lower risk school areas that do not have security devices.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Special Investigations coordinator meets with the Maintenance director to develop a preventive maintenance schedule as recommended by the manufacturers of the various types of security equipment.	June 2001
2.	The Special Investigations coordinator drafts a plan for maintenance and replacement of security devices and related supplies.	July 2001
3.	The Special Investigations coordinator submits the plan for approval by the director of Student Affairs and the director of Maintenance.	July 2001
4.	The directors of Student Affairs and Maintenance submit the plan for superintendent approval.	August 2001
5.	The Special Investigations coordinator distributes the approved plan to all affected departments.	September 2001

FISCAL IMPACT

The review, repair and replacement of security devices would cost the district about \$50,000 annually.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Develop a maintenance and phased-replacement plan for security equipment.	(\$50,000)	(\$50,000)	(\$50,000)	(\$50,000)	(\$50,000)

FINDING

The Student Affairs department does not use written guidelines or formulas to decide when to replace vehicles or implement other options to reduce the cost of vehicles for area advisors. Originally, the school police liaison team, consisting of area advisors and police officers, shared a FWISD vehicle. When the SSI unit obtained CCPD funding in 1995, new police officers added to the SSI unit were provided a police department patrol car. The initial 11 school police liaison officers who were sharing district cars were not provided police department patrol vehicles. Area advisors still share district purchased vehicles with 11 FWPD officers. The SSI lieutenant has requested patrol vehicles for the original 11 school police liaison officers. Once received, officers will transport truant or disciplined students instead of the area advisors.

The area advisor vehicles are unmarked "police-package" cars purchased through state contracts. Police package vehicles are regularly manufactured vehicles that have additional features to meet the heavy wear and tear most police departments put on patrol vehicles. Features such as a heavy-duty suspension necessary for pursuit driving and occasional off-road driving add to the cost of the vehicle. Police package vehicles also provide fewer brand options.

The Student Affairs director stated that the area advisor vehicles are replaced when maintenance costs increase, which is determined on a case-by-case basis. The director also stated that mileage is not used as a replacement factor because these vehicles have high engine idle time, causing engine wear that is not reflected by the odometer mileage.

The district also provides the option of an automobile allowance to be paid through the compensation system. Under this system, area advisors would be eligible for a \$103 monthly allowance as compensation for use of personal vehicles in district business. The executive staff, directors and department heads determine eligibility for the allowance. The district compensation manual provides the \$103 figure for a full-year contract employee, but according to Student Affairs, the amount is scaled to the number of days an employee is under contract. The district also has a plan that reimburses other positions for mileage incurred at a rate of 28 cents per mile.

Fleet vehicles can be an increasing source of cost. Maintenance costs for district vehicles have increased three times in the last three years. Area advisors serve a chain of schools located in close proximity to one another. When area advisors no longer have the efficiency of sharing a vehicle with their police teammate, the fleet program provides an opportunity for savings. Transportation costs that can be contained without impacting service delivery should be contained.

Recommendation 126:

Discontinue use of area advisor vehicles and implement automobile allowances.

When the 11 advisor's vehicles are no longer shared with the SSI officer, the transportation director should be developing a repair and replacement plan for the remaining department vehicles.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	Student Affairs director meets with Transportation director to discuss needs and use of department vehicles.	June 2001
2.	Transportation director develops maintenance review and replacement guidelines to be used by Student Affairs department.	July 2001
3.	Student Affairs director analyzes vehicle use and cost information, replacing current vehicles with standard-equipped vehicles according to guidelines outlined in the replacement procedure.	Ongoing
4.	Vehicles that are currently shared with police officers are replaced with vehicle allowances.	Ongoing

FISCAL IMPACT

By eliminating the fuel/maintenance costs of 11 vehicles and going to an automobile allowance, the district can save \$5,599 per year starting in 2002-03. Currently the district pays out annual fuel/maintenance costs per automobile of \$1,745 or \$19,195 for 11 vehicles (\$1,745 x 11 = \$19,195). By using an automobile allowance of \$103 per month per advisor the district would be spending \$1,236 dollars a year for a total of \$13,596 for 11 advisors (\$1,236 x 11 = \$13,596). Therefore the district can save \$5,599 or the difference between annual fuel/maintenance of \$19,195 for 11 vehicles and an automobile allowance of \$13,596 for 11 area advisors (\$19,195-\$13,596=\$5,599). There is no cost savings anticipated the first year since it is unlikely that the district will eliminate the automobiles before then.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Discontinue use of area advisor vehicles and implement automobile allowances.	\$0	\$5,599	\$5,599	\$5,599	\$5,599

FINDING

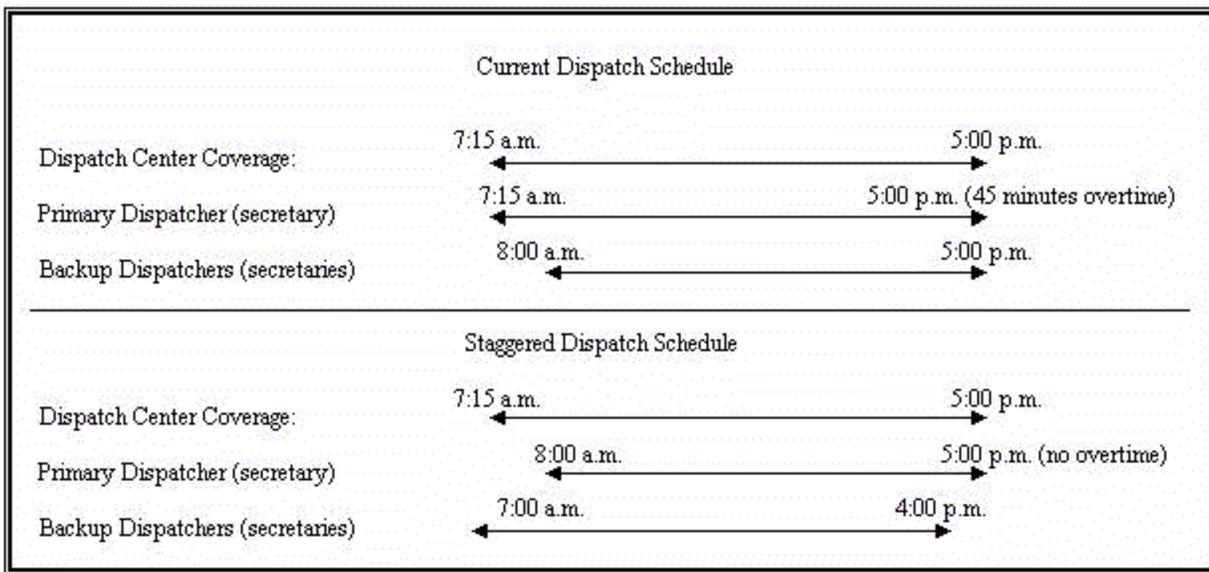
The Student Affairs dispatcher incurs weekly overtime while performing dispatch duties. School officers carry radios that are monitored through a central dispatcher in the Student Affairs offices. The SSI unit dispatcher is a Student Affairs secretary whose major daily activity is monitoring radio traffic with limited time spent on secretarial duties. The dispatcher listens to the radio transmissions, relays messages to the officers over the radio and provides emergency assistance should an officer get injured. Other Student Affairs department secretaries are cross-trained to provide dispatch backup during lunch and breaks.

The FWISD dispatcher works from 7:15 a.m. to 5:00 p.m., resulting in 45 minutes of overtime per day totaling 3.75 hours of overtime each week. The dispatcher works this schedule to provide continuous

dispatch service during peak hours. The other two Student Affairs secretaries are also trained to perform dispatch duties. While one secretary serves as the primary dispatcher, the other secretaries act as relief dispatchers when the primary dispatcher is on break. The relief dispatchers do not routinely substitute at the start or end of the primary dispatcher's shift.

As depicted in **Exhibit 12- 8**, cross-trained secretaries provide increased options for covering the dispatch center during hours of school operation without overtime expense. Over the course of a year (52 weeks) the primary dispatcher will work 195 hours of overtime under current scheduling. This equals almost five weeks of overtime annually. The current schedule costs the district \$3,587 in overtime premium pay per year plus 9.35 percent payroll benefits for a total of \$3,922.

**Exhibit 12-8
Staggered Shift Example**



Source: Staff Interviews

Recommendation 127:

Eliminate dispatcher overtime by varying the shift schedules for backup secretaries.

Scheduling one backup dispatcher (secretary) from 7 a.m. to 4 p.m. eliminates overtime costs for running the dispatch center. The primary dispatcher could be scheduled from 8 a.m. to 5 p.m. to meet peak demands. Backup dispatchers could still cover lunch and breaks. The dispatch center will still be covered from 7:15 a.m. to 5 p.m., but with no overtime costs.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	Student Affairs director develops new schedules that provide staggered coverage of dispatch duties.	June 2001
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2.	Student Affairs director provides schedules to affected staff.	July 2001
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FISCAL IMPACT

Varying the shift schedules of the primary and backup dispatchers will save \$3,922 in premium overtime pay (180 hours x \$19.93 per hour overtime rate at time and one half) +[180 hours x \$19.93 per hour x 9.35 percent payroll benefit].

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Eliminate dispatcher overtime by varying the shift schedules for backup secretaries.	\$3,922	\$3,922	\$3,922	\$3,922	\$3,922

Chapter 12

SAFETY AND SECURITY

B. Safety

Principals, administrators and supervisors are responsible for developing proper safety attitudes and educating all personnel under their direction about safety rules and regulations to be observed in their schools and departments. A safe school district effectively manages its resources and aggressively plans for potential situations. Responsive safety planning requires accurate information on the conditions in the district's schools and facilities. Safety inspections must be routine and thorough. Policies and procedures must be in place to quickly report emerging threats and promptly respond to potentially dangerous situations.

Based on models developed by justice and education agencies, effective school safety planning begins with a community-based safety planning team composed of parents, business leaders, teachers, support staff and administrators reflecting diverse ethnic and economic backgrounds. The safety planning team considers how to appropriately balance safety and security with an environment conducive to learning as they develop the safety plan. A safety plan contains the following components: crisis management plans that instruct the district staff on how to prepare for a crisis from first warning through after-crisis counseling; prevention strategies that also include early intervention; and consistent and fairly applied consequences for inappropriate actions.

FWISD has focused most of the safe school measures at the secondary level because safety risk factors increase as students leave elementary school for upper grades. A number of safety plans are in use at these schools. School monitors greet visitors and monitor the hallways and school grounds. Some schools limit classroom disruption by holding tardy students in a detention area. Some use hall passes to distinguish between authorized and unauthorized students outside of class.

The review team surveyed 36 elementary and secondary schools to identify their safety management initiatives. **Exhibit 12-9** outlines survey results reflecting the primary safety management measures in place in the district schools.

Exhibit 12-9
Sample Safety Management Measures at FWISD Schools

Security Method	High School	Middle School (Sample Size: 7)	Elementary School	Security Purpose
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	(Sample size: 5)		(Sample Size: 24)	
Identify Visitors	100% require visitor sign-in	100% require visitor sign-in	100% require visitor sign-in	Intruder Alert
Identify Staff with cards or badges	Yes: 100%	Yes: 29.0% No: 57.0% No Response: 14.0%.	Yes: 79.0% No: 17.0% No Response: 14.0% [adds to 110%]	Intruder Alert
Identify Students with cards or badges	Yes: 80.0% No: 20.0%	No: 86.0% No Response: 14.0%	No: 96.0% No Response: 4.0%	Intruder Alert, Minimize Gang Association
Master Key Control	Yes. Managed by Principal or Vice Principal.	Yes. Managed by Principal or Vice Principal.	Yes. Managed by Principal or Vice Principal.	Building and Asset Security
Alarm Code Control	School staff does not have codes.	School staff does not have codes.	School staff does not have codes.	Building and Asset Security
On Site Security Personnel	School Monitors and Police Officers	School Monitors and Police Officers	School Monitors	Truancy, Incident Management, Trespassers
Single or Reduced Points of Entry	Some schools yes; some schools no.	Some schools yes; some schools no.	Some schools yes; some schools no.	Intruder Alert
Uniforms	No: 100%	Yes: 43.0% No: 57.0%	Yes: 13.0% Yes (Optional): 42.0% No: 45.0%	Intruder Alert
Security Scanners	Yes; use varies by	Yes; use varies by school	No	Weapons, Contraband

	school			
Fencing	Back	Back	Back	Asset and Staff Security

Source: Field interviews with FWISD principals and administrators and site surveys.

FINDING

A major prevention safety initiative is the K-9 program. For this program, the district contracts for specially trained, non-aggressive dogs to sniff out illegal drugs and pyrotechnic weapons at secondary schools. The K-9 contract provides for two dogs, seven hours a day, five days a week and an additional "part-time" dog. The district requires photographs of the dogs and tests the assigned dogs to ensure they are effective. A relief handler is provided when dog handlers are sick or attending court.

The district aggressively uses the K-9 program as part of its commitment to keep drugs and weapons out of schools. As a complimentary strategy, FWISD also uses metal detectors to screen for random weapons. From 1991-2000 the number of students carrying weapons dropped from 69 to 7 per year. However, staff surveys show most believe drugs are still an issue. The 1999 figures show less than .001 percent of students arrested at school for drug possession, with the majority of arrests for marijuana.

COMMENDATION

The district aggressively uses preventive programs to keep drugs and weapons out of schools.

FINDING

The Student Affairs department has developed a *Safety Management Procedures* flipchart that provides school administrators with a comprehensive guide for handling all types of emergency situations. The flipchart provides step-by-step instructions and emergency phone numbers for handling all types of emergencies ranging from natural or operational disasters to violent or criminal behavior occurring on school property. The flipchart is easily recognizable with each type of procedure color-coded in bright, easily identifiable colors.

The Student Affairs department has also developed a handbook that provides a framework for each school to develop its own safety and crisis management plan. The individual school plans are sent to the Student

Affairs office where a checklist is compiled to make sure each has an adequate plan. Used in conjunction with the school crisis notebook, the neon colors of the flip chart provide instant recognition and a quick reference during time-critical emergencies.

COMMENDATION

FWISD's Safety Management Procedures flipchart is an effective method for providing school staff with quick and easily identifiable procedures during crisis situations at their schools.

FINDING

FWISD does not use existing technology to efficiently capture, evaluate and communicate safety program information. A large amount of information is collected and provided manually. Much of the information transmitted exists in the school computer system, but is reentered on safety forms or spreadsheets. Not all safety staff can access the computer system that captures basic student information.

There are several examples where program information is not collected or transmitted electronically, resulting in inefficiency. As one example, the community-based disciplinary alternative education programs (DAEP) are required to annually report performance statistics. A manual form provided by the district is completed and returned. The information must be entered from the form into the computer to be able to efficiently analyze or compare performance.

Another example is that the school attendance staff reports the information on students needing home visits by providing the police department with a copy of the truancy letter sent to the student. Officers must either carry the stack of letters along on the home visits, or transfer the information to a list. The schools request truancy letters from the Attendance Control Unit by manually completing a color-coded district form that requires information already captured in the district computer system.

As a final example, the Special Investigations unit records every incident reported from every source on individual sheets of paper. Each report is either investigated or closed and the status is reported weekly. The interviews with Special Investigations staff revealed that reports are produced and stored on the computer, but they are not entered for purposes of current analysis. All weekly incident reports are compiled in a master status report that is put in notebooks and sent to the appropriate administrators with an attached distribution list. Each Monday, the investigator reports the findings to staff in several district organizations (personnel, staff attorney, principals) in separate, repetitive meetings.

While the district told the review team that confidential cases are not e-mailed, current technology allows for protection of confidential information and hard copy documents are not immune to breaches of confidentiality.

There are several examples where data stored on the computer is not available to assist staff with their duties. The Student Affairs director cannot view the student database that captures attendance and other information used by the department in analyzing trends and developing strategies and programs to address these trends. DAEP staff must enter attendance data into the district computer system, which cannot be accessed by the contract administrator when approving contract payments. School police officers cannot easily view the student data used by the officers to seek and return truant students to the district. The district has a new computer program, but the training and software access has not yet extended to all necessary staff.

Manual reporting is time-consuming. Each time the same information is handled, the potential for error increases. Information remains in hard copy in the office that produced it or the office that requested it. This limits the district's ability to share performance information across functional areas for use in a variety of management reporting needs. Staff time is spent on inefficient communications creating unnecessary workload.

Recommendation 128:

Develop computer reporting forms and electronic routing to collect, evaluate and report performance measurement and other safety management information efficiently.

Developing electronic reporting forms will assure consistency in data collection and reporting. Information that is currently collected manually should be compiled and entered into existing school computer systems where possible or into personal computer databases to facilitate analysis and reporting. Word processing software features such as mail merge can be used with database information to generate items such as truancy letters, investigations status reports and other routine forms and correspondence. Spreadsheet software features such as graphics and tables can be used with database information to analyze and report information.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	Student Affairs director requests that staff review their processes to identify areas where information provided to other departments or agencies can be captured electronically or where	July 2001
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	reports are needed to measure the workload or performance of an activity.	
2.	Student Affairs director reviews information with staff to identify which information or process would create the greatest efficiency and prioritize the processes.	September 2001
3.	Student Affairs director provides prioritized list to the director of Information Services with a request to have Information Services staff meet with each functional area supervisor to design an electronic solution to the manual process.	September 2001
4.	Director of Information Services (IS) assigns staff person to work with Student Affairs staff. Designated IS staff person develops project timeline for prioritized projects and sends it to affected Student Affairs staff and coordinates access issues for identified Student Affairs staff.	December 2001
5.	Student Affairs supervisors implement the new processes according to the project timeline, working with their Information Services counterpart to improve the process where necessary.	Ongoing

FISCAL IMPACT

This recommendation could be implemented within existing resources.

FINDING

FWISD has not adopted Crime Prevention Through Environmental Design (CPTED), the most cost-effective physical security program available. The review team visited several schools, moving freely through side and back entrances. While some schools were more easily monitored from a single vantage point, others were not.

Many of the district's schools are older buildings designed when schools and neighborhoods were safer. The district has adopted a philosophy of keeping schools welcoming and attractive to students and visitors by fencing only around play areas and in the back of schools. The area advisor, school police officer and the school monitor secure the school. The monitors are provided golf carts for patrolling the perimeter of the schools.

In widespread use since 1990, CPTED lends itself to community planning, especially for schools. The benefits of CPTED include the creation of "ownership" of specific areas such as school grounds and the development of pedestrian and vehicle traffic patterns, which also enhance the sense of ownership of specific areas. Fences, pavement treatments, art, signs, good maintenance and landscaping are some physical ways to express

ownership. While existing buildings cannot be moved, their security still can be enhanced through the use of CPTED principles.

The Florida Department of Education (DOE) has developed a set of standards that incorporate CPTED principles in all construction projects. The Florida DOE found that until they formally incorporated the standards as part of their construction documents, the standards were not used properly.

Recommendation 129:

Develop a policy to incorporate Crime Prevention Through Environmental Design principles into all new construction and renovation projects.

The district should adopt a policy of incorporating CPTED in any future acquisition, construction or renovation of school facilities. The board should also require a review of current construction and renovation plans to incorporate CPTED where feasible.

CPTED principles could be applied in this instance by strategically placing hedges to reduce the area of entry and allow school monitors to more easily focus their review of those entering the grounds. Other borders might be created by the strategic placement of portable school buildings. Properly located entrances, exits, fencing, landscaping and lighting can direct both foot and automobile traffic in ways that discourage crime.

The National Crime Prevention Council publishes *Designing Safer Communities: A Crime Prevention Through Environmental Design Handbook* and has Internet links to other information sources.

The district could also work with PTA groups and current volunteers to see if they could start this program at some existing schools using parent and community volunteers.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	Associate superintendent for Student Affairs obtains information on principle and program information.	June 2001
2.	Associate superintendent meets with assistant superintendents over functional area(s) impacted by the design principles such as facilities and operations, to identify current projects where CPTED could be implemented.	July 2001
3.	Associate superintendent develops presentation on CPTED and	September

	policy guidelines for incorporating CPTED into current and future facilities acquisition, construction and renovation projects and submits to superintendent for review and approval.	2001
4.	Superintendent presents CPTED principles and policy to board for consideration and approval.	October 2001
5.	Board approves policy and the superintendent distributes to affected staff and the PTA president for their consideration and support.	November 2001
6.	CPTED is incorporated as directed by policy.	December 2001

FISCAL IMPACT

Developing the policy can be implemented with existing resources.

FINDING

Schools do not use consistent alarm procedures to identify common types of alerts such as tornados, bomb threats and hostage and shooting threats. Thirty-six schools were sampled for crisis alarm procedures from four high school feeder systems, where elementary schools feed specific middle schools and one high school. As depicted in **Exhibit 12-10**, alarms are not consistent as children move from elementary school up through the feeder system.

**Exhibit 12-10
Randomly Sampled Alarm Procedures**

Schools	Tornado Alarm	Bomb Threat	Hostage Threat	Back-up System
Pyramid I High School	Continuous bells	School specific evacuation procedures	School specific evacuation procedures	Crisis Action Team
Pyramid I Middle School	1 long then 3 short bells	School specific evacuation procedures	School specific evacuation procedures	Intercom and Crisis Action Team
Pyramid I Elementary Schools (5 schools)	Staccato bells (2 schools); 7 bells; 4 bells; 1 bell	Code Blue, Code Red, per district procedure (2); per crisis plan	Code Red (2 schools), district procedures, intercom and district procedures: crisis	Don't know; radios and monitors; room to room; intercom; crisis

			procedure	procedures
Pyramid II High School	4 rapid bells	Code Blue	Code Red	Campus monitors
Pyramid II Middle Schools (2 schools)	2 alarms; 1 loud alarm	School specific evacuation procedures (both)	School specific evacuation procedures (both)	Didn't know; Crisis Action Team
Pyramid II Elementary Schools (5 schools)	Didn't know; Code Blue, 2 long sounds; 3 horns; alternating bells	Didn't know; Code Red (2); Intercom and Code Red; district procedures	Didn't know; Code Red (2); Intercom and Code Red; district procedures	Didn't know; Crisis Action Team; Intercom and Crisis Action Team (2); Phones and evacuation procedures
Pyramid III High Schools	Campus Monitors (both)	Code Red; Code Blue	Code Red; campus monitors	Intercom and monitors; radios and monitors
Pyramid III Middle Schools (2 schools)	Didn't know; one long bell	Didn't know; have specific procedures	Didn't know; have specific procedures	Didn't know; intercom and walkie-talkies
Pyramid III Elementary Schools (7 schools)	Staccato bell (2); one long; rapid succession bells; bells with pattern; rough sound; 6 short bells	Intercom and district procedures (6); Code Red and procedures	Intercom and district procedures (6); Code Blue and procedures	Crisis action teams; campus monitors
Pyramid IV High School	Public Address, first 2 rings of bell	School specific evacuation procedure	School specific evacuation procedure	Campus monitors relay information to teachers
Pyramid IV Middle Schools (2 schools)	Alarm bell- 3 quick times, didn't know	District procedures, didn't know	District procedures, didn't know	Radio system, crisis action team, didn't know

Pyramid IV Elementary Schools (7 schools)	Long repeated bell, horn-repetitive, bell, 3 long rings, staccato bell, 3 short rings	No signal: communication with district - Crisis Action Team responds accordingly	No signal: communication with district - Crisis Action Team responds accordingly	Crisis Action Team (7), Public Address (1)
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Source: Interviews with FWISD school administrators.

Because principals and school staff may change schools from year-to-year, the lack of consistency in alarm procedures among the plans could lead to confusion in a crisis situation. Of the 36 schools interviewed, 69 administrators had been at their school three years or less, and 31 had been with their school for only one year. Students who switch schools during the year and students graduating to the next level compound the problem.

Recommendation 130:

Adopt consistent districtwide emergency warning signals.

A consistent procedure for the critical components of the plan, such as bell signals, will increase staff and student responsiveness to emergency situations. Consistent emergency procedures reinforce crisis training and drills so students and staff instinctively know what to do during a crisis situation rather than having to remember what to do.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	Student Affairs director reviews crisis plans to determine series of bells or alarms for emergency alerts and drafts districtwide procedure.	June 2001
2.	Student Affairs director presents draft to superintendent for approval.	July 2001
3.	Student Affairs director publishes new procedure to schools.	August 2001

FISCAL IMPACT

This recommendation could be implemented within existing resources.

FINDING

FWISD provides visible security monitors to screen visitors and identify trouble spots, however, site visits to various schools revealed monitors could not be recognized as security staff. The position description for school monitor lists the essential job functions as: patrols potential trouble areas such as the parking lots, lunch room and restrooms; screens visitors, checks hall passes, supervises buses loading and unloading; and performs all other related duties as assigned. Each school has at least one monitor.

Monitors are provided with a radio and at large schools are provided a golf cart for perimeter control. School monitors do not carry guns, make arrests or write citations. According to the school monitor handbook, they monitor patrol areas assigned by the principal, observe others to determine if they belong at school and note actions of individuals on the perimeter of the school as well as the entrance, exit and secluded areas of the school.

The review team visited eight middle and high schools with assigned monitors. The monitor handbook states that monitors are actively promoting safety when they are visible at schools. Monitors are required to wear an identifying jacket, cap, shirt or identification badge, but not all of them wear these items consistently, making the monitors hard to identify.

If visitors cannot identify monitors as district staff, they may not know the monitors are employees who can provide guidance in an emergency. Also, monitors may be improperly identified as other district staff, making it difficult to address complaints or commendations to the correct supervisory chain of command.

Recommendation 131:

Enforce the dress code for campus monitors so visitors can easily identify them.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The school monitor coordinator meets with principals to discuss the importance of enforcing the dress code.	June 2001
2.	The school monitor coordinator reiterates dress code requirements to all monitors.	July 2001
3.	The monitor coordinator does periodic unannounced spot checks to ensure that policy is enforced	Ongoing

FISCAL IMPACT

This recommendation could be implemented within existing resources.

FINDING

The school monitor reporting and patrol assignment structure can create conflicts. A coordinator in Student Affairs supervises the monitors, but monitors are assigned to a particular school, and the school's principal directs the monitors in their daily patrol assignments. This can create conflict about which supervisory directives to follow, especially on those occasions when the principal-directed assignments are outside the scope of the school monitor's job duties.

For example, in some schools monitors have been given a bullhorn to assist in managing student lunchroom behavior. This has raised concern over the lunchroom atmosphere and its affect on digestion. Without knowing that the monitors were security staff under the direction of the principal, these issues were directed at Food Services, which does not control monitor activities.

Still in another example, monitors are not supposed to watch classrooms while teachers are absent. However, the monitors have watched a classroom for extended periods of time until a teacher or substitute teacher arrived. Asking monitors to provide services for which they have not been trained can create opportunities for mistakes and a potential for liability.

Recommendation 132:

Expand the school monitor training curriculum and develop training materials for principals regarding campus monitor roles, responsibilities and duties.

Monitors currently receive training five times a year to reinforce their understanding of their duties and sharpen student behavior and discipline management skills. The training should be expanded to include how to avoid supervisory conflicts and appropriately handle assignments from principals that are outside their scope of duties.

Training materials for principals should clearly define school monitors' duties including what the monitors are and are not allowed to do. The materials should outline scenarios showing proper and improper usage of school monitors and outline the implications of improper assignments.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The school monitor coordinator develops training materials and submits to director of Student Affairs for approval.	June 2001
2.	The director of Student Affairs submits training materials to the	July 2001

	associate superintendent Instruction, Area I and to the associate superintendent for School Operations for review and approval.	
3.	The director of Student Affairs incorporates associate superintendents comments and presents to superintendent for approval.	July 2001
4.	The director of Student Affairs distributes approved training materials to the affected individuals.	August 2001
5.	School Monitor coordinator conducts training and provides follow-up to principals.	Ongoing

FISCAL IMPACT

This recommendation could be implemented within existing resources.

FINDING

The district does not have a consistently applied badge procedure for visitors. A random sampling of schools revealed several different types of sticker badges were used. Student handbooks indicate that all visitors to district schools must first report to the main office. There they must sign in, declare the purpose of their visit and obtain authorization. When visitors leave the school, they should return to the main office and sign out. The review team visited several school offices. Sign-in logs were not always readily available. The office at three schools did not require the team member to sign in. No administrator at any school explained the need to return and sign out. Some schools used the same type of visitor's badge, allowing a visitor to move freely from school to school unauthorized and undetected.

The SSI lieutenant said that national gangs are now recruiting in the district. Although national gangs are recruiting at FWISD schools, the district does not have a consistent, districtwide identification policy that allows security staff to easily identify visitors or unauthorized persons. FWISD effectively suppressed a gang problem in the early 1990's. However, gang recruitment is now beginning as early as middle school. Although the police department is putting extra resources toward the problem, one way to thwart recruitment efforts is to keep the recruiters off school grounds.

Effectiveness of gang suppression is hindered without an effective identification policy. Several school police officers interviewed said that they had difficulty in identifying individuals who should not be on school grounds. In large schools in particular, it is difficult to determine whether an unfamiliar adult is a possible intruder or a parent, for example.

Similarly, it can be difficult to determine which students should have school access.

The review team visited four high schools, four middle schools, two district alternative education schools and five elementary schools. In two schools, monitors were passed without question. In two schools, monitors greeted and directed the team to the office. In three schools, administrative staff stopped the team member with directions to the office. In one middle school, a student directed the team member to the office. In several schools, monitors were not visible to the team. **Exhibit** presents a summary of the observations from the school visits.

**Exhibit 12-11
Randomly Sampled Security Procedures**

School	Staff Visible and Identified	Security Visible and Identified	Unknown Visitor Stopped by Monitor	Unknown Visitor Stopped by Staff	Sign in Required by Office	Badge Dated for Day of Visit	ID Required
High Schools (4 schools)	Yes (2) Visible, No ID (2)	Visible ID backwards Visible ID, Visible, No ID (2)	Yes, after several pass-bys, Yes (2), Yes, at two separate locations within school	No (2) Yes (1) None passed (1)	No (3) Yes (1)	No (4)	Questions, but vague answers accepted. Questions, ID requested. Questioned Closely. No
Middle School (4 schools)	No staff passed, Visible, ID Not Visible, Visible, No ID	Not visible (2), Visible, No ID, Visible, Uniform	No (4)	No, directed by student, No (2) Yes	Yes, Passed office, no challenge (3)	No, N/A (3)	Questioned closely, N/A (3)
Elementary Schools (5 schools)	Visible, No ID (5)	Not visible (5)	No (5)	No (2) Yes (3)	No (2) Yes (2) Passed office, no challenge	No (4) N/A	Very closely questioned, No (2) Some

							questions N/A
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Source: Site visits to selected schools by TSPR team members.

Many school districts around the country have implemented photo-identification badge systems for both students and employees. For example, Killeen ISD adopted a badge system in 1998 for its high school students and employees. The student badge has a photo, a bar code and magnetic strip. Killeen is in the process of distributing badges to all middle school students, and also plans to use them for documenting teacher attendance at in-service training in the near future. For substitute teachers and visitors, the district uses numbered badges without pictures. Waco ISD also implemented a badge system in January 2000. Both districts implemented such systems primarily due to security concerns.

Recommendation 133:

Design and implement a consistent districtwide identification system for students, staff and visitors.

Proper identification of visitors is important to deterrence and investigation of criminal incidents. Visitor logs provide a record of individuals in the building. Having unrecognized visitors provide identification that is captured on the visitor's log helps investigators locate witnesses or suspects in criminal investigations.

Requiring some form of visible staff identification will increase the ability to quickly distinguish school visitors. Staff identification badges or uniforms will also allow students and visitors to quickly identify school leaders during a crisis or emergency event. Requiring student identification will assist security officers in identifying unauthorized students.

Enforcing sign-in and sign-out policies and writing the date and school initials on visitor badges will assist in recognizing unauthorized visitors. Each unrecognized visitor to the school should be required to provide identification and then should sign a log that notes the type of identification and the identification number.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	Student Affairs director selects committee of parents, students, teachers and principals to review identification policies and make proposals for identification types and display policies.	September 2001
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2.	Student Affairs director drafts procedures based on recommendations and presents to associate superintendent for Student Affairs. Recommendations include cost estimates for implementation.	November 2001
3.	Student Affairs associate superintendent meets with associate superintendent for Non-Instructional Services to reach agreement on identification type and policies.	November 2001
4.	Associate superintendent for Non-Instructional Services assigns staff to implement.	December 2001
5.	Student Affairs supervisors and principals train staff on identification policies.	January 2002

FISCAL IMPACT

The design of the identification system can be accomplished with existing resources. Implementation costs can only be determined by the components of the design.

FINDING

Signs directing visitors to the school's main office were not easily seen, allowing visitors to wander through hallways without knowledge of the sign-in requirement or direction to the office. Several schools have signs directing visitors to the office on small 3x5 stickers that are frequently placed only on the main entrance doors. In some schools, the signs had been defaced or were covered by security bars or grates. There were few signs on entrances other than the main entrance.

Signs communicate district policy to school visitors. When the policy is not communicated through signs, staff must actively communicate it. School monitors cannot be everywhere, particularly where school grounds remain largely open. Signs reduce the communication burden on monitors and police officers. In elementary schools, where there are no monitors, signs can reduce the communication burden on staff as well as provide visitor direction when class is in session.

Recommendation 134:

Place clearly visible signs at all entrances directing visitors to the office for sign-in.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	Facilities director assigns staff to work with principals in determining most effective placement of signs and number needed for effective communication and direction.	June 2001
2.	Facilities director orders signs and develops installation timeline.	July 2001
3.	Facilities staff installs signs according to timeline.	August 2001

FISCAL IMPACT

The retail cost of permanent signs directing visitors to the office should not exceed \$100. If one sign were placed at each of the 120 schools the estimated cost would be \$12,000. The district may decide on additional placements that are not factored into this estimate.

Recommendation	2001-02	2002-03	2003-04	2004-05	2005-06
Place clearly visible signs at all entrances directing visitors to the office for sign-in.	(\$12,000)	\$0	\$0	\$0	\$0

Chapter 12

SAFETY AND SECURITY

C. Student Discipline Management

The U.S. Department of Education's publication *Early Warning, Timely Response*, defines a well- functioning school as one that fosters "learning, safety, and socially appropriate behaviors." These schools have a strong academic focus and support students in achieving high standards, foster positive relationships between school staff and students and promote meaningful parental and community involvement. Most prevention programs in effective schools address multiple factors and recognize that "safety and order are related to children's social, emotional, and academic development."

Texas schools are required to provide standards for conduct and discipline through the adoption of a student code of conduct. FWISD has a student code of conduct that is provided to students and parents annually. The code is accompanied by an acknowledgement that the rules were read and understood. The board also has a discipline management plan that provides guidelines and appeals processes for levels of disciplinary action. Decisions for removal to the Disciplinary Alternative Education Program(DAEP) are developed in a conference and hearings process through the Student Affairs department. Offenses, which carry a possible penalty of expulsion, receive disciplinary hearings. Other offenses receive disciplinary conferences.

The district has several levels of disciplinary alternatives. Students may be removed from regular classes to a disciplinary alternative learning area in their home school. Students may be suspended and placed in a disciplinary alternative education program in a FWISD-provided school. Suspended students may be placed in a community-based disciplinary alternative education program under contract with FWISD. For felony offenses, a student may be placed in the Juvenile Justice Alternative Education Program (JJAEP) operated by Tarrant County but staffed with FWISD teachers.

FWISD's Student Code of Conduct places offenses in four categories: general misconduct; behavior subject to removal from a regular education setting; behavior resulting in expulsion or placement in an alternative setting; and placement in the JJAEP. **Exhibit 12-12** presents examples for each category of offense.

Exhibit 12-12

Categories of Offenses Outlined in FWISD's Student Code of Conduct

Category	Examples of Offenses
General Misconduct	Cheating or copying the work of another; Leaving school without permission; Scuffling or fighting; Disobeying school rules or failing to comply with directives given by school personnel; Possessing matches or a lighter; Disrupting the school environment or educational process; Violating safety rules or the dress code; Possessing a paging device or cellular telephone.
Removal from Regular Education Setting	Causing bodily injury or property damage; Theft of any item on school property; Hazing; Use of force or threatening use of force on another individual; Committing or assisting in robbery or threat (non-felony); Verbal abuse (name calling, racial or ethnic slurs, profanity); Inappropriate physical and sexual contact; Possessing, smoking or using tobacco products; Possessing or selling seeds or pieces of marijuana in less than usable amount; Possessing, using, giving or selling prohibited substance paraphernalia; Possessing fireworks or other pyrotechnic devices; Possessing or selling "look-alike weapons;" Possessing air guns, BB guns, mace or pepper spray; Making threats or false threats regarding school safety; Violating computer use policies.
Expulsion or placement in alternative setting	Vandalism; Robbery or theft; Extortion, coercion or blackmail; Hazing; Insubordination; Profanity, vulgar language or obscene gestures directed toward others; Fighting, committing physical abuse or threatening physical abuse; Falsifying records, passes and other school-related documents; Refusing to accept discipline management techniques proposed by the teacher or principal; Possession of the following as outlined by the <i>Texas Penal Code</i> : firearm, an illegal knife, a club, a prohibited weapon such as an explosive weapon, a machine gun, etc.; Behavior containing elements of the following under the <i>Texas Penal Code</i> : aggravated assault. arson. murder or attempt to

	commit murder, aggravated kidnapping, indecency with a child, retaliation against a school employee or volunteer with one of the above listed offenses.
Placement in JJAEP	Felony activities

Source: Fort Worth Student Code of Conduct 2000-2001.

Unless the behavior is a major violation of the penal code or code of conduct, discipline is administered initially at the student's home school. Once certain misbehavior identified on the above chart occurs, the student is referred to a third-party conference that is administered by the Student Affairs department. The placement committee reviews case facts, prior behavior history and previous rulings on similar facts. The student can appeal a committee ruling to the superintendent. The superintendent's decision can be appealed to the board, but few cases are appealed at this level.

Exhibit 12-13 provides disciplinary activity and student referral information.

**Exhibit 12-13
Student Referrals for Serious Misbehavior
Comparison 1998-2000**

Offense	Total Offenses		Percent Change
	1998-1999	1999-2000	1998-2000
Felony Arrest	382	332	-13.1%
Weapons	271	253	-6.6%
Threats	136	265	+86.0%
Assaults	365	470	+28.8%
Gang Related Behavior	86	171	+98.8%
Serious/ Persistent Misbehavior	1,061	849	-20.0%
Vandalism	61	48	-21.3%
Sexual Harassment	29	65	+124.1%
Alcohol/ Drugs	405	363	-10.4%
Totals	2,796	2,816	+0.7%

Source: FWISD Student Affairs Department.

FINDING

FWISD has funded a truancy intervention program with a full-time assigned prosecutor from the District Attorney's Office and a counselor from the Lena Pope Home. The Comprehensive Truancy Intervention Program (CTIP) is a collaborative effort between the FWISD, Tarrant County District Attorney's Office, FWPD, Tarrant County Juvenile Probation Department, Lena Pope Home, mental health and social service providers and community-based organizations. The Lena Pope Home contracts with FWISD as a DAEP. The home is an established program for troubled youth in Fort Worth. FWISD provides teachers, and the home provides behavior interventionists for referred students. The Lena Pope Home also provides behavior interventionists to other district programs.

The program's goal is to reduce the number of trancies by combining law enforcement and family social services. Schools have been selected based on absenteeism. After a target number of absences, parents are sent a letter on District Attorney letterhead asking that they attend a truancy meeting. At the meeting, the Assistant District Attorney (ADA) tells parents of the legal and social consequences of truancy. Social service agencies make presentations and offer services to attendees. If a student is absent after the meeting, the ADA meets with the student, parents, vice principal and counselor in an individual session at the school. Additional absenteeism is referred for court action.

Repeated absenteeism is a criminal violation. The district treats truancy as a "gateway" crime to other more serious criminal activity. Students who miss class without authorization are frequently drawn into criminal misbehavior in the surrounding neighborhood. Keeping children in school decreases the incidence of juvenile crime and increases the chance they will successfully complete their education. Dropping out of school is a major predictor of adult criminal behavior.

The FWISD truancy program is based on the needs of high school feeder systems. In the program, the feeder systems are placed into three tracks based on truancy rates and available services. Tracks I and II schools have social service programs on-site that manage truancy issues and are considered non-target schools. Track III schools do not have on-site truancy and social service programs and are considered the target group. **Exhibit 12-14** outlines the basics of the program.

Exhibit 12-14

Comprehensive Truancy Intervention Program Elements

Step	Track I	Track II	Track III
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	Regular Program (Arlington Heights, Carter Riverside, Dunbar, South Hills, Southwest, Western Hills Pyramids)	Regular Program (Diamond Hill-Jarvis, North Side, Paschal, Polytechnic Pyramids)	III-A Program (Eastern Hills, Trimble Tech Pyramids)	III-B Program (O.D. Wyatt Pyramid)
One	1-4 Unexcused Absences School sends warning letter, programs and services	1-4 Unexcused Absences School sends warning letter, programs and services	1-2 Unexcused Absences School sends warning letter, programs and services	
Two	5 Days Unexcused Absences District Attorney (DA) letter #1 to parent(s) Weekly Monday Night meeting	5 Days Unexcused Absences DA letter #1 to parent(s) Weekly Monday Night meeting	3 Days Unexcused Absences DA letter #1 to parent(s) Weekly Monday Night meeting	
Three	Failure to Attend Monday Night Meeting and/or Continued Absenteeism Social Service Agency Intervention (Access Program)	Failure to Attend Monday Night Meeting and/or Continued Absenteeism Social Service Agency Intervention (Access Program and Communities in Schools)	Failure to Attend Monday Night Meeting and/or Continued Absenteeism DA letter #2 SART Meeting*	Failure to Attend Monday Night Meeting and/or Continued Absenteeism DA letter #2 FWPD Home Visit SART Meeting
Four	Continued Absenteeism Home School Coordinator continues to monitor Referral to Justice of the Peace (JP) court	Continued Absenteeism Home School Coordinator continues to monitor Referral to JP court	Failure to attend SART Meeting or Failure to Abide by Contract and/or Continued Absenteeism Home School Coordinator continues to monitor Referral to JP court	

Five	Failure to Abide by JP Order JP Court	Failure to Abide by JP Order JP Court	Failure to Abide by JP Order JP Court
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Source: FWISD Comprehensive Truancy Intervention Program dated May 23, 2000.

* SART is the term for a Student Absenteeism Reduction Team meeting. SART meetings are held at students' schools with the student, parent(s), school counselor, ADA, and Lena Pope Home Counselor. Student contractual agreements are signed outlining conditions and available resources.

As shown in **Exhibit 12-15**, Fort Worth's attendance rates minimally improved from 1996-2000. When compared to its peer districts, Fort Worth ties for last with San Antonio and Austin in percent improvement with a 0.1% increase in attendance.

Exhibit 12-15
Fort Worth ISD Attendance Rate Comparisons with Peer Districts
1996-2000

District	1996	1997	1998	1999	2000	Change 1996-2000
Dallas ISD	93.4%	94.1%	94.2%	94.5%	95.1%	+1.7%
Houston ISD	93.7%	93.8%	93.9%	94.0%	94.2%	+0.5%
El Paso ISD	95.0%	95.1%	95.1%	95.3%	95.3%	+0.3%
Fort Worth ISD	93.6%	93.6%	93.5%	93.7%	93.7%	+0.1%
San Antonio ISD	94.0%	93.9%	94.1%	94.2%	94.1%	+0.1%
Austin ISD	93.7%	93.5%	93.8%	94.1%	93.8%	+0.1%

Source: Texas Education Agency AEIS District Multi-Year History Data Reports.

Although the truancy program began in the spring semester of 2000, preliminary data shows improvement, particularly for the target or Track III schools. **Exhibits 12-16, 12-17 and 12-18** show the comparison between spring 1999 and spring 2000 average attendance rates for the high schools, middle schools and elementary schools.

**Exhibit 12-16
Fort Worth ISD High School Attendance Rate Comparisons
1999-2000**

School	Spring 1999*	Spring 2000*	Change 1999-2000
Track I Schools Average (6 schools)	90.7%	90.7%	+0.0%
Track II Schools Average (4 schools)	88.3%	89.2%	+0.9%
Track IIIA Schools Average (2 schools)	90.7%	91.6%	+0.9%
Track IIIB School Average (1 school)	85.0%	89.1%	+4.1%

*Source: FWISD Comprehensive Truancy Intervention Program Report.
Attendance Rates have been rounded to one decimal point from the report.

**Exhibit 12-17
Fort Worth ISD Middle School Attendance Rate Comparisons
1999-2000**

School	Spring 1999*	Spring 2000*	Change 1999-2000
Track I Schools Average (8 schools)	92.4%	93.6%	+1.2%
Track II Schools Average (8 schools)	92.6%	93.4%	+0.8%
Track IIIA Schools Average (2 schools)	91.6%	92.7%	+1.1%
Track IIIB Schools Average (2 schools)	91.5%	92.5%	+1.0%
Track I/II Alternative School Average (1 school)	95.9%	96.7%	+0.8%

*Source: FWISD Comprehensive Truancy Intervention Program Report.
Attendance Rates have been rounded to one decimal point from the report.

Exhibit 12-18
Fort Worth ISD Elementary School Attendance Rate Comparisons
1999-2000

School	Spring 1999*	Spring 2000*	Change 1999-2000
Track I Schools Average (31 schools)	94.7%	95.2%	+0.5%
Track II Schools Average (23 schools)	94.9%	95.3%	+0.4%
Track IIIA Schools Average (7 schools)	94.0%	94.9%	+0.9%
Track IIIB Schools Average (6 schools)	93.9%	95.0%	+1.1%
Track I/II Alternative Schools Average (3 schools)	95.4%	96.2%	+0.8%
Track IIIA Alternative Schools Average (3 schools)	88.0%	87.0%	-1.0%
Track IIIB Alternative School Average (1 school)	75.1%	82.3%	+7.2%

Source: FWISD Comprehensive Truancy Intervention Program Report.

**Attendance Rates have been rounded to one decimal point from the report.*

COMMENDATION

The district's truancy program provides a comprehensive approach for intensive intervention based on collaboration among school, social services, law enforcement and court officials.

FINDING

Fort Worth's unique after-school program initiative funded with \$1.4 million from the Crime Control and Prevention District (\$300,000 of the \$1.4 million is spent on Benbrook ISD) and \$1.1 million from FWISD, places educationally based programs in areas that are economically disadvantaged and that have high incidents of neighborhood crime. The program is free to qualifying applicants. Principals select the program that best meets their school's needs based on an audition by program service providers. Program examples include the YMCA, Stone Soup, Voyager, and Campfire, as well as programs designed and provided in-house by school staff. By providing children with a safe and supervised place to go after school, the program hopes to minimize the potential for criminal victimization of students. The district also hopes to keep students from the temptation of committing neighborhood crime after school by providing an interesting and educational program.

Programs are monitored to ensure they provide well-rounded activities such as life skills, educational enrichment, and physical activities. The programs also provide tutoring and other activities designed for academic improvement. Principals notify the program monitors of their satisfaction or dissatisfaction with the program providers. The program service approval is a prerequisite to payment of program invoices. The program is also developing an independent evaluation component to determine the effectiveness of the program providers. While the newly designed program has not been implemented long enough for a successful analysis of its performance, the educational components of the district after-school program and its crime prevention goals distinguish it from traditional day-care programs.

COMMENDATION

The district's after-school program initiative addresses at-risk elementary and middle school students' social and educational needs, while keeping them safe from potential victimization on the streets after school.

FINDING

The district's reporting structure for providing alternative education to students who need to be disciplined is split between two different supervisors. FWISD has two middle schools and one high school (DAEP) for students who have been suspended or removed from regular schools due to violence, possession of illegal substances or serious misbehavior that violates FWISD's standards of conduct. FWISD contracts with 11 agencies that serve students who have been expelled or suspended from school. The director of Alternative Schools, who also supervises the non-disciplinary alternative education programs, supervises the district run DAEPs. Until 2000-01 school year, contract DAEPs were under the supervision of the coordinator of Community-based Education in Student Affairs. An employee on special assignment to Student Affairs is currently providing DAEP contract administration.

No formal evaluation of FWISD's disciplinary alternative education programs (DAEP) has been conducted. An evaluation of the community alternative school sites was carried out in 1997-98, but no evaluation of the overall system has occurred. The superintendent reviews and hears all third party placements and students are assigned to the FWISD disciplinary schools or contract sites through central disciplinary action as prescribed by the Texas Education Code.

The results of the outside evaluation of the FWISD community alternative school sites, conducted by two professors at Texas Wesleyan University in

1998, show that the community sites were not able to meet students' needs and raised concerns related to: inadequate funding to cover needed support services; a need for more qualified male teachers, staff and mentors that better matched the demographics of the students; difficulties with the student data tracking system; and excessive time between third-party hearings and enrollment in the community schools. Results of their study are listed below.

- The district's use of a "brief intervention" model via the community alternative schools results in the failure to provide timely educational, psychological and other critical services to students.
- The transition from the regular schools to the four community alternative schools is problematic and is hampered by this coordination problem. Cultural and gender factors are elements in the alternative school placement process. These factors need to be more diligently examined and addressed by district policy makers, curriculum designers and educational service providers.
- The data regarding cost per student clearly indicates that community alternative schools are funded at a significantly lower rate than district alternative schools.
- The pattern of enrollment of students in the community alternative schools makes continuity of educational programs and services challenging.
- A concern among all contract alternative schools and evaluators is the problem of information exchange pertaining to students. It is difficult to plan the most effective educational program for students without specific information regarding the student's special needs and situations.
- Many of the students have an acute need for psychological support services, including assessment and individual or family therapy.
- Staff and teacher training and retention at some alternative schools are problematic.
- Each school has unique needs they want the district to supplement. In most community alternative schools, the schools need the district to extend more and/or different support services.

FWISD has three DAEPs. When these schools reach capacity or when students have been unsuccessful at these schools, placements are made at privately run DAEPs under contract with FWISD. Of the contract DAEPs, FWISD teachers staff the Lena Pope School. The JJAEP is also staffed with FWISD teachers under an inter-local agreement. The remaining contract schools do not consistently require certified teachers.

The quality of education differs between contract programs. Students told district staff that they want to go to the contract alternative schools

because they get to read comic books and they attend fewer hours. The quality of facilities is also inconsistent. Some contract schools were clean; others were not. Some contract schools provided hot lunches; others did not. The district has hired a consultant to review the disciplinary alternative education programs and make recommendations for improvement.

The district has an accelerated high school for students who do not excel in a traditional school program, as well as a day program for pregnant teens. The other alternative programs are disciplinary alternative education programs. In interviews, district staff said that students or their parents have asked to be placed in the district disciplinary alternative schools even though their children are authorized for attendance in their home school. Staff said that this is because some students cannot excel in a traditional setting but have no practical alternative. Some middle school students do well with the small class and structure of an alternative setting, but the only alternative middle schools are disciplinary. Some high school students cannot attend the alternative night school, but have no day program available unless they are pregnant or misbehaving. Students who are unsuccessful in their home school may misbehave in response to the pressures of failing, resulting in a possibly preventable safety problem.

Recommendation 135:

Align the oversight responsibilities for all alternative education programs under the director of Alternative Schools.

The transfer of responsibilities to Alternative Education including the special assignment position currently monitoring the contract DAEPs will assure consistency of education delivery in both the contract schools and the district-run schools.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	Board approves transfer of responsibilities and the transfer of the special assignment position to Alternative Education.	June 2001
2.	Human Resources makes any necessary changes to position descriptions or other organization documents.	July 2001
3.	The director of Alternative Education notifies contract schools of the new reporting and supervision change.	September 2001

FISCAL IMPACT

This recommendation could be implemented within existing resources.

FINDING

Site-based management has resulted in variations in discipline-management procedures. The district does not review and analyze the variations to determine if certain policies or combinations of policies are more effective for student management. For example, some schools report attendance once a day. Some schools report attendance every period. The comparison of policies against truancy efforts could provide important information to administrators in developing successful procedures in their own school.

As another example, the Campus Monitor Coordinator stated that monitors are trained to identify students who are out of the classroom and in the halls each period. The coordinator observed that teachers did not always know that a student had been in the hall during their classes. He noted that the monitor provides that continuity of oversight.

One campus, however, provides students with planning notebooks. These books include the student handbook, a calendar for organizing events and due dates, and a hall pass log. Students carry the organizer as a hall pass. The organizer serves to identify students from non-students and shows every class in which a hall pass has been authorized. Each teacher can see how often a student is released from class. Not all schools use a hall pass log. Some rely on school monitors.

The associate superintendent for Instruction Area I stated that the principals meet to discuss issues and share solutions that have worked in individual schools. However, there is no formal process for benchmarking or cataloging best practices within the district.

Recommendation 136:

Develop a reporting structure to evaluate discipline management and related safety practices on a districtwide basis to identify, document and implement best practices.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The associate superintendents designate a staff member to compile best practices for each operational area.	July 2001
2.	Staff member schedules periodic meetings with school administrators and support departments to identify best practices and performance measurements.	August 2001
3.	Staff member provides information to Information Services department for placement on the Internet.	October 2001

FISCAL IMPACT

This recommendation could be implemented within existing resources.

Appendix A

PUBLIC FORUMS AND FOCUS GROUP COMMENTS

As part of the review process, the review team held public forums and focus groups to obtain input. During 11 public forums, parents, teachers, administrators and community members participated by writing personal comments about the 12 major topics of review; and in some cases, talking in person to review team members. Teachers, principals, employees, students, parents and community members also participated in 14 small focus groups where the 12 topics under review were discussed.

The comments below illustrate community perceptions of FWISD and do not reflect the findings and opinions of the Texas Comptroller of Public Accounts or the review team. The following comments are listed by topic.

A. District Organization and Management

- SBDM [site-based decision making] is working in some schools.
- Some schools have a hard time getting parents involved.
- Participants' level of understanding varies.
- This [school attorney] is one of the best additions to the district.
- Quick information is available about legal issues.
- Attorney has been very responsive to principals' needs/requests.
- [Need to be] harder on dress code.
- [The school] has an excellent principal. I have a student enrolled in the school and I feel there could be no better principal for the school than the present principal.
- Address problems head on-ignoring them won't make them go away!
- Administration [is] top heavy [with] little coordination between departments. Too many of them sit and think up more things for teachers to do.
- Administrators do not answer questions of staff-e.g. Can't follow through on promises, can't explain why it didn't happen and REFUSE to explain why.
- As a parent my best opportunities came from district 3 committee boards that offer communities in all areas a chance to be a part of their children's education.
- As a staff member at high school for the past 9 years, I have seen many changes. Our present principal is wonderful. With all the problems in the area, gangs, etc., the over riding problems that the students themselves have to handle as an extra burden, the strong community background; the principal has been the driving force, the glue, that has held this school together, [some] might feel that

high school was on the verge of perhaps being closed until she arrived. Under her leadership we have come together, not all of us, as a faculty that each day has to deal with many different situations, but through all of this [the principal] constantly reminds [us] of why we are here, "For the Children."

- As a teacher at high school, I feel that the faculty, student body, and the principal, as well as the staff as a whole, work hard to make things happen!!
- At least 50 percent of the time of Special Education supervisors, diagnosticians, and psychologists, is spent on clerical duties. Recently, these professionals (paid on average more than \$50,000 yearly) have been assigned data entry duties at the building level. This duty will take at least 10 to 15 percent of these individuals' time. Due to lack of clerical assistance, these individuals already spend as much as 20 percent of their time on clerical duties such as addressing envelopes and making copies of forms and documents.
- Board members act in individual capacities and are directly involved in personnel decisions that are not their personal decisions to make. Board members give direct orders to principals. If the principals do not respond as directed, they suffer serious consequences.
- Board-presently a unified front.
- School monitors need to chill.
- Does the district have a policy?
- Don't have enough referees for lower games.
- [District staff] is doing a wonderful job in bilingual communication.
- High School-I think lunch and passing period should be longer than what they are [so] everyone could get to class on time to learn the same thing without missing some of the assignment, then we won't have any excuses.
- During the beginning of school, we had a faculty meeting and we reviewed our handbook [with] the site-based decision-making member (most of them were present). Then open positions were [announced] and staff members were encouraged to sign up. Announcements were made. During our first PTA meeting this year, representatives of the SDBM team/committee were there and [spoke about their goals] and how their goals [would be achieved]. Our school improvement plan has addressed improvement for our district. New technology supplies and software will be in alignment with the school improvement plan, which is great.
- Our high school is on an OK level if it is being [compared] with other schools.
- I think the schools should go back to block schedule, because it gave me more time to study with the teacher [so I could] understand my work.

- Every spring, nominations are made for teachers to vote for SBDM. After nominations have been approved, the teachers have an opportunity to vote for four teachers to represent the faculty of high school.
- For the past several years schools have made giant steps in organizing and implementing educational programs; [more] than has been [done] in the past through its present staff.
- FWISD's District Advisory Committee and the Superintendent's meetings with student groups and teacher groups are fine. Site based management works if the principal allows it to work. Some school management teams are really effective, for others, it is a real struggle.
- Give some "power" to SBDM teams! Add student members-then listen to them.
- Happy with the quality of teachers.
- How is the school budget set up? [What is the] process to have it changed?
- I feel that when our last principal was fired, that we as parent should have been notified, or at least told, not having to hear from the students. We need to have constant communications with the school and the district.
- I feel the organization and management is good. They care.
- It is okay; the assistant principals need to lighten up a little bit.
- [I] like the principal and vice principal.
- Money [is] misspent.
- Our New principal is doing some good things. Hope we are able to keep him, but Administration/Central Office might take him.
- Not enough money for extra curricular activities, half of extra curricular budget [goes] to athletics.
- Our Fort Worth School Board has not one parent of a school age child serving. This makes no sense. There should be "term" limits to them and all grades should be represented.
- Our principal has undergone a number of challenges this year. During the first of the school year, we experienced a number of conflicts [that] failed to disrupt the classroom activities. I was glad to be at a school where the leaders looked at the safety of our students and staff members. We have been cautioned about reviewing our "Handbook" for the safety and asked to inform our students about safety. It has worked. During the fire drills, our students follow the instructions provided. Hopefully, all of our schools will continue to address safety through the schools. However, I have been concerned about the support or the appearance of key school officials present after several bomb threats and fights, especially after added security was requested.

- Parents should be involved in the concerns and decision-making. Even if the parents aren't voted in, they should be included in the process.
- POOR (OR LACK OF) communication between downtown and schools. Find out one day that benchmark tests need to be administered two days later. Scheduling changes happen on a moment's notice-central office should respect the authority of schools AND schools should have competent leadership.
- Principal at Carter Park is doing a good job.
- SBDM at Dunbar does not work as the legislature envisioned. Voting for members is not done as far as I can tell; i.e., as a teacher I have never voted for teachers on SBDM or had the opportunity to do so.
- Site-Based Decision-Making in the high schools should regroup and become more involved with parents.
- Inform parents before absences are out of control (do not assume a parent knows that the child is absent).
- Do not let a student complete a year of school and not be successful with their grades without some notice that help is needed.
- There are children who would like to succeed and are unable to because of various reasons-take time to know why they are not successful.
- Also, if a student comes from middle school and they were a National Honor Society student there should be someone to guide the student through the transition into high school so that they continue to excel in their education.
- Students should receive their credit in high school when they earn the credit. Parents should be informed if they do not receive a credit before school is out. (Due to absences less than four days.)
- Site-Based Decision-Making is a joke. The principal has [his/her] agenda and expects everyone to go along. No one wants to serve [and] have their time wasted.
- Site-Based Decision-Making is working well in the schools. I was on one [team] at the elementary level. I think our board works well together. I was asked to attend (trustee) meetings for district 6. It was very informative and I appreciated [district staff] taking time to keep us up to date of happenings in our district.
- Site-Based Decision-Making isn't [working].
- Sometimes there is concern for safety when it comes to extra [curricular] activities. The administration takes every precaution when it comes to group activities.
- Strategic planning and decision-making need some working. The decision-making for our school is okay; some stuff is hard to work with but overall it's good.
- Superintendent doing a great job trying to educate all the students.

- Superintendent has made improvements in education of students and adds stability for the district to progress.
- Superintendent-[he] deserves every penny he makes, education will not employ the most talented individuals unless it provides an appropriate reward system. The superintendent is a model for other superintendents and organization leaders in his ability to clarify and focus attention to a specific task. It is unfortunate that he uses intimidation, and indifference as a management style. The rapid rise in militant "unionism" (among teachers) is a predictable result of his critical commentary.
- Teachers get no respect-high turnover.
- The board should not have a say in hiring or placement of particular individuals (friends) and overrule the superintendent.
- The competition bid process needs to be scrutinized and looked into significantly. The contract process, the preparation of bids, "bid specs" and how they "tend" to be written a certain way tends to give an unfair advantage to certain "types." That is all I will say. The process is unfair. Also, why do we have people in our "reading department" who have past association with certain book companies that we today in this district are so conveniently now ordering from? Why? Where is our "conflict of special interest" or what looks as if there is a very obvious conflict of interest? Why do we pay for certain "consultants" that have previously been "employees" of the district after they left the district? Where is our integrity? Honesty? Why are we giving special treatment or advantage to some people?
- The NSHS parents would like to have had more input in the selection process of the new principal, there are some points about him that have the parents concerned.
- The School District Org. is too "top heavy,". It also has an over abundance of "team people" who are ineffective in the classroom. The (FW)ISD therefore assigns them to work on "area teams" or "easy work assignments" while those that do have professional [experience and take] on very great responsibilities, like principals, other administrators, special teachers, etc. are paid the same or less and do twice the work that area team members do. This does not provide incentives to our stronger professional staff people. It unfortunately is a reward for those that don't want to work or are not proficient in education. This is wrong and unfair. We have great SBDM [teams] and we have a good professional staff. Unfortunately, we need more "bilingual" teachers, counselors, diagnosticians, principals and bilingual Special Education al staff. We need a better technology plan than we have. Unfortunately schools like "Trimble Tech H.S.," which is supposed to be an "all district technology/trade school" is lacking "state of the art" resources, technology and materials. In comparison to other

schools, it is a "disgrace," yet the staff and principal there are performing "miracles" with sticks and stones. Can you imagine if you give them top quality support, what they could do? Also why is Trimble Tech H.S. last to be considered when it's time to distribute resources, tech equipment, materials, and other resources? Why do other schools on the "West Side of Fort Worth" get first choice, get special treatment, get first shot at all these items and Trimble Tech gets the leftovers? Take a look at the past "technology funding and resource budgets" and you will note the "UNEQUAL" distribution of educational/test need/trade distributions of money and resources that the (FW)ISD has not done anything about until recently.

- The school should have a better principal.
- The superintendent makes too much money for doing what? Take some of that money [and give it] to some teachers. We need teachers more than an overpaid superintendent.
- The superintendent should back his teachers and staff rather than siding with the board.
- The superintendent is great with parents and listens well.
- We [should] to be able to use the phones when needed.
- We are top-heavy in this area. We have too many "guiders." We need more teachers.
- We have decent facilities at DHJ. I say decent because FWISD recognizes us as the second smallest high school, so why bother. Plus the Hispanic culture does not condone speaking out. So FWISD only cares about who cries the loudest!
- Who do you talk to about the buildings at the school?
- Who do you talk to when there are no books for a class?
- Why does the FWISD charge a high rent for use of the school building for Alumni reunions when many of the ex-student associations give money to the graduating class?

Appendix A

PUBLIC FORUMS AND FOCUS GROUP COMMENTS

B. Educational Service Delivery and Performance Measures

- Regularly scheduled meetings to discuss instructional issues and curricular issues with principals, allows schools to develop their CIEP with the DIEP.
- There is a concentrated effort to get consistency throughout the district, and to get lesson plans coordinated so that students moving within the district don't miss anything-Pathways to Excellence-they also have great adaptations for Special Education students.
- Staff development is becoming combined so that reading teachers, Special Ed. reading teachers, G/T reading teachers, etc. are all integrated.
- Suggested improvement: Majority of teams are elementary-need more secondary representation.
- Suggested improvement: Consistency with who is assigned as primary contact person-every year there is a new one.
- Schools have implemented corrective reading initiatives-have provided great support.
- ESL department is great-have a great new language center, have a great intake process for non-native speakers-they are appropriately placed.
- International Newcomer Academy-for students with no English. Great support with translators.
- Drop-Out Prevention
- Success (HS) and Accelerated (MS) campuses fill up early and principals have a hard time placing students.
- More needs to be done to mitigate potential problems with 9th graders-principals are initiating their own programs, but a vision needs to be coordinated for a comprehensive, district-wide dropout program.
- One school got a success grant from TEA.
- One school got money from Pregnancy Related services to run a self-paced lab for credit recovery (on computers).
- Current Success program only takes kids who are 16 years of age and have less than 15 credits.
- There needs to be more of a focus on PREVENTION, and target students before they are in danger of dropping out.
- G/T Program-is making progress, there is a standard process for identifying G/T students.

- Special Ed-have identified areas of weakness but they are in process of working on it.
- Need Help with STEPS process, ARD support, Psych evaluations.
- Need appropriate support staff to provide assistance with paperwork, etc.
- All current support is from central office, no psychologists or ARD support staff on campuses.
- Need to know how to deal with severe behavioral problem kids-no clear placements for these children.
- Teacher class ratios are fine-principals have control over class loads, but NOT the number of teachers per campus.
- Academic teaming doesn't work well because the principals do not have control over the number of teachers in a school and it is not well supported because the teams serve from 140 to 175 students each.
- Inconsistency between schools on the number of planning periods allotted to teachers.
- Counselors [are] spending [the] majority of their time on administrative tasks (test scheduling) and not enough time counseling students. Currently, [they are] coordinating major tests once every 3 weeks. Suggested that a full-time Testing Coordinator be hired.
- Testing data comes back in [a] format that is not helpful-some principals have developed ways to use data, but most rely on research and development.
- Corrective Reading and ESL Department are doing a good job.
- The drop out rate is still too high.
- We need to articulate a prevention program. Some schools have it, but it needs to be district wide.
- Night school only accepts students with less than 16 credits, but some students drop out with 18 credits.
- Drop out programs need to coordinate prevention at early age.
- If a school partnership [needs] to write a grant, sometimes people downtown don't help.
- Academic teaming is not being supported because the number of teachers is allotted according to the number of students. There has not been a staff development in four to five years on how to be a team leader.
- The number of counselors per school varies and [is] not based on the number [of students] in the school.
- Comments Related to Gifted and Talented: Making progress; used to be school by school but now there is more coordination. Identification is now standard throughout the district.
- The support staff that deal with ARD is not given enough support.
- Support is not given to keep up with paper work.
- Teachers are pulled from teaching to do paper work.

- Clerical and psychological support is just not there.
- STEPS Program has not offered training.
- Severe behavior problems are not given support.
- The standardized files have improved, but there is a tremendous stress on staff.
- It is hard to keep good teachers working with emotionally disturbed students.
- [For the] last three years of my life, while attending middle school, I was an A-B honor student, [on] yearbook staff, and played all sports. I think it is hard to fit in as a freshman.
- [Need] prep for SAT (OK, we 11th and 12th graders are done w/TAAS, help us get into college).
- Algebra teacher doesn't know how to teach, doesn't explain very well.
- Alternative placements are not consistent.
- Ask kids what they think would be better help to the kids that are having hard time learning to learn quicker. Have more activities for the students to get more acquainted.
- Call in contractor for signing- Hired Hands.
- Carter's Special Education is great; they pay a lot of attention to the kids.
- Computerized algebra-need 80 percent to move on; only get through 70 percent of material.
- Concern about counselors because they are depriving children of an education.
- HWNT scholarship-the ones chosen were wrong, counselors pass out applications to selected students-top 20 in class.
- Curriculum is too easy.
- Each pyramid has one person.
- Freshman and sophomores get a 30-minute advisory period right before lunch, called PSAT/Advisory but really [it] is TAAS prep and meetings.
- Gifted and Talented needs overhaul.
- Give kids credit due (not brownie points).
- Grade padding increased in 98, decreased in 99.
- GT/Magnet/SIP- it's great that we finally have some state mandates for the above average, but these programs have not been funded. AP classes [are] without books, teacher materials, [or have] books that fall apart after 2 years, untrained teachers in difficult classes, 35+ students in a class.
- High schools need to spend more time training students that are not going to college.
- I am a first grade teacher with 21 students who are primarily ESL. My only support during the day is a classroom reduction teacher (CRT) that comes in my class as a Reading Mastery support person. I am a new teacher and am slowly figuring out how the

school system works. I was very surprised that my students have no music teacher, no art teacher and no PE teacher. I am the primary teacher from 8:20 am to 2:45 pm with no planning period. My only break throughout the day is a half hour lunch, which ends up getting lost to passing out lunch cards, stopping by the office and getting the classroom ready for the afternoon activities.

- Our school is currently under construction, so the students have no playground and the only outdoor place to play is a barren straw field. I feel like they need some physical activity, but getting to the area to play is a challenge all by itself. One other major concern I have had is the expectations from administration. I was given the TPRI test to administer to my students with 2 weeks to learn how to administer and test all 24 of my students. I had no substitute to help; I was expected to test students throughout the day while the other students worked. My first graders are low-level English speakers and are not able to do seat work for extended periods. It was a mess and a very stressful situation for [both] them and me.
- I am not, [and] never will be a fan of TAAS! I do think you need an overall test, assessment to see how the kids are doing, but please review it! Some curriculum in my girl's high school is so old, [it has] never [been] revisited or changed [and] the kids are bored! For some reason our school board is not behind my elementary children's Applied Learning at Alice Carlson. Last year, they took away our middle school at (Bluebonnet) and housed it in an old furniture store with INA! It works and our school board fights it. Look Again!
- I don't like it when I'm taking a test and I need help, but my teacher tells me she can't help me.
- I feel as if we, as students, tend to take too many tests.
- I feel that if you fail TAAS and have to take it a second or third time. If you don't pass the second time they should go ahead on give you your diploma. And if you're a senior, you have to take it at the last minute and that holds you up and if you don't pass that [is] embarrassing to you and your family and friends. Therefore, my point is that [if] you're a senior and haven't passed it they should go ahead and let you have you diploma and cross the stage.
- I like the approach to reach all different student ability levels and I commend you for developing programs to address these needs. However, need strong, sensitive, and talented people to not only administer these programs (and you usually have them), but to also supervise, lead, offer suggestions, review progress with the teachers and help them stay on task so that they are effective and do each student a significant amount of good.
- I shouldn't have to take my child out of public school and put them in private school so that they an get the education they deserve-the education my tax dollars are paying for.

- I think that counseling at Eastern Hills is not very adequate. Every time I go into the counselor's office either my counselor is not there, or they don't have any [of the] materials that I ask for. They always make empty promises.
- I thought "magnet" wasn't PC?
- I wish the programs were more complete.
- I would like for teachers to get into the mood of teaching as funnier. Someone to understand clearly.
- I would like to see TEAM emphasized more by coaches. Too many [coaches] think they are the only ones carrying the team!
- It seems to me a lot of class time is spent on TAAS. Some classrooms seem to deal with it better than others. Example-having 10-15 minutes only for TAAS.
- Keep teachers out of the PTA's business. Mishandling of funds, need teacher input to a certain degree, but not on fundraising.
- Look at counselors, what are their roles? Attitude is get rid of the problem students instead of helping them, waste of our time and money.
- Middle school counselors test vocabulary but have no strategies for follow up.
- Most teachers are very unorganized!
- Need more time for passing period.
- Need to teach more about sex education and AIDS, etc.
- Observation that there are students being excluded because of favoritism.
- Pleased with GT program.
- Pleased with special ed-like [being] mainstreamed; had a new ARD to transfer; pleased with experience
- Riverside's Special Education needs to pay more attention to their kids (504) and not just pay attention to certain students.
- Schedules should be changed when you see it fit.
- Some of the teachers are rude.
- Some teachers can be rude at times or all the time. Everything else is cool.
- Sometimes teachers are treated like glorified babysitters-they are asking MORE of teachers and giving them less to work with.
- Special Education is the sun we all revolve around. What about services for everyone else? Too much paperwork.
- Special Education needs to get more involved and more recognized.
- Staffing-no cap on student/teacher rations after grade 3-up to 42-45 students per teacher in middle school and above; classes are 45 minutes long-after attendance and other administrative duties they have 39 minutes of instruction.

- Students, parents, community and teachers are so stressed with passing "TAAS". When will teachers be able to just teach life skills and higher education skills?
- TAAS may serve a purpose, but why not get back to the basics-reading, writing, and arithmetic. The kids need the arts, music, band-they need a creative outlet. It has been proven that those who participate in arts tend to be top students and tend to score better on tests. Please don't quit providing these things. Also, please don't get so caught up on TAAS that we forget to teach discipline, common courtesy, kindness, good behavior-if a school has respectful, disciplined students, won't they learn better and as a result do better on tests? I say this because at my son's high school during the orientation, much emphasis was given to TAAS and scores-then at the first pep rally, the behavior was horrible-rude disrespectful, mean-it was a huge disappointment.
- TAAS? Why bother? No one cares what professional educators or experts say about high stakes testing. It has turned education into politics; not improving student performance; just wasted paper.
- TAAS-great idea to level the playing field but we teach to the test, even to the point of re-mediating students who have passed.
- Testing is good for the mind [and helps] to store information better. [Students] should be tested for every grade for every year to see if, after the summer passes, last year is still remembered. Also Success needs a shop class for kids who like to do hands on work (cars, computer, woods, etc.).
- This school has helped a lot of kids pass TAAS last [year] and I expect the same [this year].
- Too much focus on TAAS. Needs to be available but it isn't everything. Teachers are handicapped because they have to spend too much time on TAAS.
- Waverly is great, exemplary programs, lots of writing, wonderful staff, principal.
- We at EHHS are quite pleased with the Ed. Service Delivery. In addition, the service personnel are well trained, polite and efficient.
- We need to get ready for TAAS!!, No one is listening to teachers who have concerns about what happens in two years. Principals are only worried about this year. Are we doing what is best for the school or what is best for students?
- We need to improve on the school, not only the building, but the staff as well.
- [I] would like to see more TAAS information given to greater school parents-honors kids and parents have more information geared towards them. Have importance made [clear] to 6th grade and above parents the requirements [that] need to [be] passed to graduate. Many Spanish-speaking parents do not realize the importance of taking TAAS. Our principal is too idealistic with

many new agendas, too many [times it] is [a] fact that our students and staff can't seem to catch up. He has not communicated with student's parents about Open House-SBDM Openings. The school claims to have sent out Flyers. High schoolers don't bring home flyers/notes to their parents. Waste of paper! Phone calls-or messages on the marquee-even colorful posters at neighborhood stores work better than flyers!

- Educational services: The curriculum here is in alignment of the TEKS and TAAS. The guidelines pathway has been a pattern for teachers to follow. Members of the departments meet to review the curriculum and to address concerns. Special Education students are a part of the classes. Forms are provided to staff members for modification if needed. The educational program is gradually confirming all students not just one group of students in the majority. I would like to see more African American [students] in the G/T and the magnet program. Hopefully [they] will be available at least four times a year for testing and recommendations.
- Student/classroom sizes are much better this year since we've been able to hire a few more teachers. We just have to, as teachers, learn to make adjustments with what we have! Often times, we spend too much time griping!
- Teaching instruction is taking place at Dunbar High School. Our test scores have to level off to be acceptable. We are constantly striving for excellence. We tutor, mentor, counsel, and support the student in every way possible. Whatever materials are needed or suggested to get, we will try.
- Academic achievement has increased in the Dunbar Pyramid. The staff, parental involvement and student desire to learn has caused this increase. TAAS scores are on the rise.
- As a parent I feel there should be more Magnet and Montessori classes. Not for other children to be transported from other areas why not put our children who are in the district in a better position. We need more tutors more volunteers.
- [Need] for TAAS [to] have more pre-testing so the kids will know their weaknesses and their strengths, [to] offer more tutoring for students that want to go to college so when it comes to taking the SAT or ACT they will be more familiar with that testing system. [Need for] expressing the importance of passing and taking the right courses during the school year. Also the athlete signing up for the clearinghouse with the NCAA.
- As a student I believe that TAAS scores every year are coming up. But the performance in classes needs improvement, meaning teachers and students aren't getting along. The student, instead of the teacher, controls most classes. But for the magnet program I have no complaints. Although they do work them too hard.

- The TAAS test should not be a requirement for graduation/diploma. If a student has completed all courses/credits; they should receive a high school diploma. Some students don't do well on standardized tests and shouldn't be penalized for this.
- Student performance on TAAS is getting better. Dunbar works very hard with the student body to increase performance. The magnet program is being dismantled by imposing new rules that keep [the] magnet schools from recruiting students they believe will benefit [the] most.
- Class sizes in science (Chemistry and IPC) are so large that teachers cannot safely bring students into lab. Therefore, [the] TEKS objective for 40 percent lab time is not met.
- The parents would love to be able to choose graduation date!
- GT students aren't offered enough choices [for] enrichment (activities) to nurture students.
- High School teachers do not communicate with parents, yes, progress reports are sent if [a] student is failing, but other than that I've gotten only one call from a teacher the entire four years my child was in H.S.
- Special Education -ARD meetings are dreadful; parents have to beg for service for their child. Why don't administrators of Special Education just meet the needs of our special child without having parents feel like they're doing our child a favor; like it's a chore teachers [must do]. My son has had ARD and [they] were great but supervisors and decision makers have not made it easy to work with. It seems like minimum (expectations) standards and criteria are used to assess the needs of Special Education students. My child is severely language delayed and is delegated to 60 minutes of speech per week. Why can't my child be taught sign language? I'm really put out with Spec Ed. in FW; the decision makers are so worried about least restrictive environment that the students that are in LINC classes are not receiving the best programs; its not the teachers; it's the decision makers that oversee the FWISD.
- New student and 9th grade orientation needs more development. This orientation should provide students and parents with more information on dealing with teen success and achievement during high school years. I believe regular meetings should occur through the high school years at every grade level.
- Counselors in schools don't have time to help students with personal problems, schedule selections and college applications and information. They spend many hours on TAAS data and paper work. At some schools too many students are assigned to a single counselor. Sometimes as many as 400 to 450.
- The four percent dropout rate in FWISD high schools is a LIE. The district simply reports dropouts as "change of district", "moving out of state," or other false codes. Students who are no show at the

beginning of the school year simply disappear from our accounting.

- The "college bound" curriculum (a state level function) is completely unrealistic for large numbers of high school students. NO hands-on vocational skill training is available in most high schools in Fort Worth. No wood shop, no welding, no auto repair, HVAC, etc. high school Special Education classes typically have 20 to 30 students at a time. That's not very "special." Equipment for Special Education classrooms has been packed in boxes (and is today (October 19, 2000)). Since December of 1999. Special Education teachers cannot access books and equipment purchased with federal funds, because it is all packed in boxes. There is no certain date for these materials to be available in a warehouse. The PEIMS data regarding Special Education students that will be reported on October 27, 2000 will have hundreds of errors. Due to inept planning by central administration, as of October 19, 2000, Special Education records from SASI have not been entered, corrected, or verified in any manner by the Special Education supervisors, diagnosticians and psychologists. The department's previous method of data verification (yellow cards) was abandoned before school started and as of October 19, 2000 no replacement has been established by the central office. Without a miracle - hundreds of errors will be reported as fact for funding.
- I was always informed that Deaf Education got money from the state for their classes (funding), but now Special Education has their money. Deaf education and special are not the same, and should never be joined together as one. Because every time you ask for something it's not in the budget or we don't have the money, well where is it?
- Get people that know how to really teach the classes. I have had years working with people that [don't] know or teach the kids anything.
- We need thespians, because colleges (UT, NYU) look for that specifically to enter. [The] theatre arts/drama teachers [are] not qualified.
- I think girls should be able to do all things that boys do! Like playing football and Frisbee!
- Attendance - Very difficult to keep up with. Seems very haphazard. Transfers come in with no records at end of school year, attend for three or four weeks and teachers [in] one grade decides whether to pass to next grade. No pass-no play rules not being enforced.

Appendix A

PUBLIC FORUMS AND FOCUS GROUP COMMENTS

C. Community Involvement

- We do get support from Community Support and Student Affairs.
- In most schools, site-based decision-making works. Some schools are having a hard time getting parents involved.
- Problems with both parents working/single parents, etc.
- All schools have things such as family reading and math nights, etc.-people from support teams come out - whatever it takes.
- The district helps when there is a need. The district supports other agencies coming in.
- They ask neighborhood churches to help announce when parents are needed.
- Principals need to provide translators for parents; there are not enough translators in the district - the burden is on bilingual staff at the district
- How can we get the community more involved in our schools? Only recourse right now is cold calls, for which teachers and staff don't have time.
- We have to be responsible ourselves for getting people into our schools.
- It varies across the district because part of the responsibility is on the principal.
- I think the community would be more involved if there were more classes on stuff we have to handle in the real world.
- I'm fortunate that my high school girls are at Arlington Heights. We are kept very informed about meetings, forums, and community involvement. It's been great. The individual school has done this.
- It's hard. Good communication and community motivation require more effort and see fewer results in our day and time than in previous eras of education. Today, in our fast-paced, long-working, "committed" hours career positions, people have less time for involvement and are too tired. Computer messages and website information may help some. Poor people, hard-working people need more motivation, which requires a huge joint effort by the educational leaders, especially on the school staff level. Keep up the good work, get together and plan and do it and don't quit; reach out, send messages home, call, do it all! I appreciate the effort and I know there are lots of parents out there who care just like me, who are waiting to be contacted (again and again).

- More activities need to be held after working hours for more parents to become involved.
- More community relations with business-school partnerships for all schools.
- More parents need to be involved, but school partnership and communications are good.
- On the high school level there should be a hired person to develop community involvement.
- Our parents need to feel that teachers want to talk to them.
- Overall our community is involved in our school. Parents come to check out events even though the kids might not participate. They come to support the school.
- Parent involvement good at elementary [level].
- Parent involvement is very poor at [this] school. Student involvement is also a problem. We need to get the community involved. They need some pride and something to get excited about. It's dead here!
- Parental involvement exists only at the affluent schools. And then it is usually interference rather than involvement. Schools should be used in the evenings to offer things to draw in the parents (English classes, tax/SS assistance, etc.). If the parents felt like it wasn't teachers versus parents, they might participate more. This all depends on the leadership at the building, which in most cases in FWISD is very poor.
- Deaf students have the least amount of parental involvement at home (crucial), which of course extends over to school due to communication barriers.
- I would like to see parents having a desire to learn (sign language) to better communicate with the children/school/etc., maybe more classes being offered to teach sign language to "hearing" parents.
- Parents should work on setting better examples at home: read in front of children, use correct grammar, and refrain from profanity.
- Parents who do not participate in PTAs get booted to the bottom.
- Some parents feel that they shouldn't help with school activities because in the past they felt like the people in charge didn't want their help.
- Somebody needs to communicate better with parents. Don't count on the students to let parents know things.
- Success needs a PTA with a budget to get started.
- The whole community should get involved, like at the games a lot of people don't go. We should have more spirit, like have banners around, or maybe a parade or something.
- This area is perhaps the worst I have seen in 10 years of education (nationally). Where community involvement is concerned, low self- and community-esteem and a severe lack of any civic responsibility are to blame for this ineptness.

- This school needs more parent involvement for maximum student success. Believe me-we try.
- We have improved on parent participation, but we need some classes for parents at night so that they feel more comfortable visiting our school.
- People have said, "be careful with what you say or to whom you say it" and [it] makes me feel that I'm not free to say what I feel. In some schools, racism exists, and that's not good.
- Parents of NSHB feel, as though we couldn't pick our new principal. All the final candidates were up to the school board.
- Parents should be involved in the PTA activities and visits to the school. With a large number of parents working, I know it's difficult. It's difficult when you are on this side of town and your child(ren) attend in another area. The number of parents attending the PTA meetings has been small. Our "Youth Fair Chore" program has opened the door for a number of business partners to enter and assist with the education. I would like to see more programs like the mock bank with one interaction with one of the local banks. (I know this is a local issue.). I believe this will be beneficial for all schools.
- One way to get community involvement is for parents to get and feel [like] a part of the programs the schools offer without so much red tape; working together we can and could make this happen.
- Parental involvement seems to be picking up but more involvement is needed for our troublesome but not lost yet students. They need to work more with the teachers.
- Parents should come to the school sometime and check up on their children. Also, support them in extra [curricular] activities such as after school.
- The parent's involvement is very important. Parents need to know what is being taught by teachers. Also, a detailed background of each teacher's ability, education and relationship with students [should be available?]. Community leaders should be available and have access to the overall performance of each school's standards/reputations in the community.
- The parents of "greater" school students at Dunbar are not very involved. There are more "magnet" school parents involved. At Dunbar we have a great Business School Partnership. Youth Fair Chore - school-to-work does a lot to involve students in businesses. One of our partners in business is Bell Helicopter - they provide Science Fair judges for our school fair each year.
- Parental Involvement is on the increase in all the schools in the Dunbar Pyramid.
- We need more parental involvement. A lot of times, students bring their problems from home and try to get them solved at school. They feel protected here at school.

- I would like to see more parental involvement here at Dunbar. But the students are really neat. Parents are involved in those activities of interest to them! Maybe one day...things will be different when these students grow up ... become parents themselves. The business school partnership here in the building works out great!!
- Dunbar administration works continuously to get parents and community involved.
- It has been very different to get parents out to PTA meetings on a large scale.
- We have a very successful community school supported by the community. The school is operated to provide skills to community persons and persons in success areas (for example, learning how to use a computer).
- Parental support (as well as community) is greater than any other school in the district here at Dunbar for all activities.
- Parent apathy in some unique cases is extremely alarming. Everyone needs a positive home life to have the best opportunity to succeed.
- [I] would like to have vice principal liaison with school PTA/PTO, [to] have at least one recognition lunch/dinner for parent volunteers given by principal and his staff at school.
- I think to get more parents involved we need more teacher/parent conferences, we need to be more informed about what's going on in our school, either through [a] newsletter or phone calls, or maybe something placed in the newspaper. Maybe we should have carnivals to bring the community together.
- There are adequate opportunities for parents to be active in school activities.
- I would like to be more up to date on what is happening at schools. A parent newsletter paid for by parents would be excellent. Teachers using the computerized algebra program need to remember their students need interpersonal contact. It is easy to let the computer do the teaching but our kids need to see their teacher being a good example and showing leadership.
- The first few years I was associated with Southwest, I was somehow informed about PTA meetings and was able to attend some to become acquainted with what was going on. I grew up in private church sponsored schools; my children did too for their elementary and middle years. So I had no experience with public schools except all the bad stuff you always hear. Frankly, I was afraid for my child to go there, but it became financially necessary. I was used to being informed about anything going on at school and used to being involved. A pleasant surprise was how welcoming the teachers were and how interested they seemed to be in helping the students. Over the years I have become more confident about the safety issues. Some teachers did a good job of

presenting material and challenging students, other didn't. For the most part, if the student is willing to work they will learn something. The downside is there was little flow of communications. There were hardly any notes sent home. I understand sending something via the kids doesn't always work. The phone electronic message works some - however last year I heard of no PTA meetings - I don't think it was even up on the billboard, which was [a] surprise. The newsletter was helpful, but sometimes after the fact. At orientation could there be a list of PTA dates, times, places, etc. given out. I would be willing to pay a reasonable fee for a "Parent Newspaper" to be mailed to my house to keep us informed about what is going on and coming up. It's frustrating to only hear about things after they happen. Open House is a great idea - I always look forward to meeting teachers and hearing about the course offerings and requirements - early in the year is best. The frustrating part is the short time limit. I realize you're cramming a lot into an evening, but the teachers hardly had time to say much, barely had time for questions, etc. I was running from one to the other as fast as I could to cover both - missed most of the teacher's talks, picked up some handouts - some teachers ran out or didn't prepare one - it made me realize what happens to some simple parents sometimes - it was frustrating and that was my one shot to meet teachers, etc. outside a personal conference to each.

Appendix A

PUBLIC FORUMS AND FOCUS GROUP COMMENTS

D. Personnel Management

- Staff development for teachers happens on school-level and district-level.
- "Mysterious formula" for staffing-admin gives schools enrollment projections and then says they have X number of personnel units, then principals are instructed to hire those X (number of) people.
- The NEED of schools is not taken into consideration. High concentrations of Special Ed, Voc. Ed., ESL students do NOT affect staffing formulas, [they are] based purely on total number of students.
- Need an instructional coordinator in schools.
- Allotment of counselors per school is inconsistent.
- Great support; they call early to find out our needs.
- They give signing bonuses.
- Allow us to go to the job fairs.
- Support staff is great. They help protect our interests.
- School attorney is always available and does a great job.
- HR assists with student teachers.
- Excellent mentoring program.
- Great TAG program,
- Administration looks at a formula but not the needs of student populations for staffing purposes; meaning the budget that principals receive for staffing their schools is based purely on enrollment and not the types of students in a school.
- Can't keep custodial positions filled; retention and high turnover is a problem.
- Paying custodians once a month is not desirable for low paying jobs.
- There are not enough bus drivers.
- The pay for bus drivers is not enough to attract and keep them.
- Job Fairs have gotten better in the past 3 to 5 years.
- District is doing a good job of making contact early in the year and getting people on contract.
- District is making efforts to attract teachers in high-need areas.
- The school-level survey is a good mechanism to identify teacher/staff needs in the district. This has produced some positive benefits in hiring staff.
- Signing bonuses are being offered in high need areas.
- Principals are pleased that they get to go to job fairs, meet applicants, and in some cases, they hire "on the spot."

- Teacher recruits tour schools during visits.
- The district has an excellent mentoring program for beginning teachers.
- [I] want to know why schools can't get teachers if they need them- principals are trying but if they didn't request slots for enough people the previous spring, central administration won't let them have positions filled.
- [Teachers, administrators] treat parents badly when kids are late- talk down to you, crass- other parents have same problem.
- Administrative hirings have become a nightmare worse than any affirmative action plan could ever be. People are hired and promoted based solely on ethnicity and not qualifications. Good people within the district are passed over for outsiders of color or women. People are promoted without certifications.
- As a new teacher I was hoping that I would find interaction with other teachers stimulating and motivating. I have found very little sharing or creativity amongst my peers, either due to burnout or totally different teaching strategies. I am a big public school advocate and want to be involved, but have been stressed out since school started. I would be interested in being involved in making changes for the district if anyone would like to contact me.
- Coaches teach- don't teach, talk about football. Coach walks in- people stand up.
- District level administrators: superintendent, assistant superintendents, associate superintendents, are paid too much as are other upper area staff members. Why does the superintendent have a \$1.2M 5-year contract that gives \$298,000 in one of those years? Also, how many of these public servants making \$90,000 plus have car allowances and why? If a person is pulling down \$7,000 to \$9,000 a month can't they afford their own car expenses?
- During recruitment you [are] promised [a] bonus, but [they] manipulate [the] contract signing to make the bonus unavailable, because of timing.
- Everyone gripes about not getting paid enough. FWISD and Birdville, being the better paying districts, and other districts are atrociously LOW!
- FWISD seems to be successful in recruiting new teachers, but we don't keep them. There is a tremendous turnover each year. [Many] of my faculty left again this year, only 3 retired; 3 promoted were within the district; 27 of 85 teaching staff left. People will not stay in the teaching profession. There are no real incentives to stay; few fringe benefits; salaries are not the only issue. I feel there is a general lack of respect for teachers and their contributions; there is no "status" to the profession. All this contributes to the teacher shortage. There will be few 30-year teachers in the future. In all of

the above statements, FWISD is not unique. I believe this is a state and nation-wide problem.

- Good staff development-district has made good effort to help teachers be more sensitive to diversity. District needs to do more to develop substitutes.
- I am writing as a first year teacher (First Grade) in the FWISD. I have a history of working with children in a wide variety of capacities. I have been very disappointed by the lack of professionalism within each step of the hiring and training process of the school district. I teach first grade and after accepting a position with the district, I was informed that I was to be the ESL teacher. I went to sign my contract with the District and they said that all the new teacher-training classes were full. I was assigned a mentor teacher who has been with the district for 13 years, and this was somewhat helpful. I have now been teaching for nine very frustrating weeks. My students have been moved around several times due to overcrowding and two [were moved] due to transferring and I have gained three students. The upheaval has been difficult and [made it] a challenge to get to know students.
- I really enjoy my summer technology training. I plan to get as many computers out of it as I can.
- In the Special Education classroom there is supposed to be the teacher, an aide and a behavior specialist. Rumors have it that hall monitors make more than aides, it is impossible to keep the aides.
- Interpreters are degreed people and state certified, having to take written exams and tests, paying annual dues, collecting CEC's. It is a profession in high demand but the money is not a reflection of that, which is why school districts have us believe there are no interpreters available-and they are not, for the money they are willing to pay them! Interpreters with [a] higher level of certification should be paid a higher amount than the lower levels because their skill is higher and to encourage others to gain better skills.
- Is a superintendent of 70,000 students worth \$225,000?
- It has amazed me that some of the high schools etc. have such young teachers. I hope you can keep them. Keep salaries high and back them up with strong discipline. I hear the most complaints concerning discipline. If we can get that back in our schools and respect, I think you'll keep the good teachers.
- New teachers are not adequately supported and nurtured.
- No recourse for staff that aren't doing their work-why does downtown use some areas of schools for dumping grounds of incompetent staff? I mean the EAST side of Fort Worth!!
- Not enough interpreters hired for the deaf. Never enough subs. What is being done to recruit them? Pay is not based on BEI levels. How can we get Level III to come to our schools and interpret for

out little ones if we don't pay. I do understand FWISD pays better than some other districts, but...

- Recruit the best-and pay them appropriately. A raise in pay would draw more and better staff and teachers.
- Recruitment of "outside" personnel is questionable. FWISD went to Spain to recruit "Spanish"/Hispanic teachers to identify with changing demographics. Excuse me, but there is a huge difference in cultures between European "Hispanics" (Castilian) and North American Hispanics/Latinos/Chicanos/Puerto Ricans.
- Recruitment of administrators is equally questionable. Why are fully certified and credentialed individuals overlooked for unqualified applicants? I was formerly an administrator with FWISD and experienced what could only be reverse discrimination. Sure, people of color in high profile areas are important, but what about effectiveness? I had administration experience, eight years classroom experience and people with two-three years of classroom experience and zero years administrative experience [got hired]. I'm not talking sour grapes here, I just find it unlawful to hire strictly on the basis of color.
- Recruitment of teachers from other professions-people are allowed in the classroom with no training (taking classes at night). These people are not prepared or supported by administration staff.
- Regarding hiring practices, [they] should be based on a persons abilities relating to the position versus who you know in FWISD.
- Salary starts off great for a beginner, but a teacher with eight years [experience] makes \$1,400 more than one with zero years. Something is wrong. The superintendent makes more than the President of the United States.
- Shortage of sign language interpreters.
- We have little coverage for interpreters who are out sick.
- Many deaf students are in classrooms with no interpreter.
- The deaf students DO NOT have the option of going to the Home School because they are deaf, because the district is not putting the Deaf Ed. Support Service (Interpreters) according to the ADA law a priority.
- Many deaf education classrooms are way over the proper ratio. But on the code books as to what that limit or ratio should be, has been deliberately left open-ANOTHER LOOP HOLE.
- Staff development is useless and a waste of money. Teachers are dumped into meetings of little or no use. One day to prepare for the new year, four days of meetings-no opportunity for teachers to share lessons and resources with each other.
- Staff Development: Ever since the superintendent arrived staff development has been on a blanket basis. All teachers go to their discipline area staff development. All teachers-master teacher and novice teacher. (What happened to "Glickman's Quadrant" formula

for staff management: burned out, direction, no direction
master/professional?)

- Staff development? Any more "development" and we'll bust out of our collective "shirts".
- Staff Structures. Why do some high schools have 3-4 assistant principals when 2-3 would suffice? Is there a number or ratio formula to decide this issue? (Granted some schools have varying dynamics and need more than other schools.)
- Suggestions for New Hiring and Recruitment:
 - Change format of recruiting new teachers from the "cattle call" style meetings they have had during the summer to fill open positions.
 - Make new teacher training available to ALL new teachers. (When I tried to sign up they told me all classes were full.)
 - Have some sort of check-in system with principal. (My principal has casually asked me how things are going, but is almost always busy.)
 - Have resources available (such as extra teachers to help in class) to ease the first year teaching stress.
- Teachers are GROSSLY underpaid, overworked and unappreciated.
- Thank you for the raise...it just about covers the increase in my insurance.
- The middle school in my neighborhood has had five different principals in seven years! No business should be run that way!
- The Personnel Mgt. Area has certainly made large improvements over the past year.
- The staff is cool; they really work with you instead of just assigning things.
- The staff is great. You can really talk to the teachers.
- Too many administrative support personnel making twice what a teacher makes.
- Too much of the salary is placed with top administrators.
- FWISD should do their hiring early in February and March and not wait so late, because top students in education majors want to sign and [have] reassurance they'll be hired; not wait till June, July and August to be signed on. Teachers should be paid more for all the hard work they do; administrators in FW are paid extraordinary high salaries compared to the teacher's salaries. Staff Development In-services seems to be slapped together and don't entirely relate to what is being taught at all buildings. Last year at the elementary level, a video of an Andy Griffith show was shown on a 19" or 25" size TV in an auditorium to teachers for social studies. It was a very poor presentation talking about global learning and how students need to learn to live globally in this day and age. FWISD should quit bringing in outsiders to work in our high need areas - at

NS the community and parents are not happy with having two new principals in our school within [the] last 2 years.

- There is a great staff on board but I think that the departments need to work more together to present a unified front of involvement from the teachers.
- Staff development - hiring practice - by parent or friends working with student and coaches if the opportunity comes and a position is available, offer that parent or friend if he or she qualifies the [for] position. Example I'm now a truck driver, but if given the opportunity, I would take the necessary steps to become a coach in the FWISD. Also, hire position coaches or coaches who know that particular sport. That would fall under recruitment.
- Personnel management: working payroll department, and keeping staff bookkeeping work with good business management responsible duty.
- The building administrators should have the opportunity to select the type of staff members compatible to the population of the school.
- If you are not a part of the DHS community it's hard for staff members to be selected. Our administration needs to be involved more with this process.
- I was pleased to be a part of a staff where all teachers hired here were certified. The salary is fair. Staff development has covered some concerns that have [been] great for me-the coverage of sexual harassment. The presentation shared some informative points. The pictures and information were great for helping me to explain more to my students about sexual harassment. Staff development is covering issues of concern. It [is] worth it.
- We need interpreters in our district to cover classes and [the district needs to] look into [providing] a break during the day so we don't have to go out on workman comp, because we can't use our hands, need better chairs to sit in and places to put our belongings (like a room would be nice).

Appendix A

PUBLIC FORUMS AND FOCUS GROUP COMMENTS

E. Assets and Risk Management

- Affordable insurance for all FWISD employees and subs.
- Benefits for teachers are very poor. Signed up for dental. The contact Dr. on HMO literature was not taking new patients, forced to deal with Monarch. Choice becomes no choice.
- Health insurance is too high. We need a larger group to bargain with.
- Health insurance needs to be better, cheaper to cover more of the better doctors without being punished for it by being forced to pay higher prices. Focus more on prevention and not fear-threatening a multi-billion dollar industry of pills and treatments.
- Need statewide health insurance!!
- Not enough accountability to the taxpayer for wasting money- Admin buildings, mail-outs, surveys and "studies,"; purchases of programs (algebra lab) from friends of the superintendent.
- Nurses deserve their rightful pay.
- The cost of health insurance is ridiculous!
- We need insurance benefits that are comparable to private businesses and state employees.
- You call it health insurance, but it is a very poor excuse for health insurance. If we are employees of the state (and regulated by the state) we have earned the right to be included in state retirement and state health insurance. The only answer to good insurance is to be a part of the state pool. My raise went to pay for the insurance increase.
- Health Insurance - FWISD and Texas need a state insurance for teachers. Health Insurance is too expensive for the low quality of insurance offered. We need a decent insurance.
- Health insurance is getting poorer each year. Cost is increasing, benefits decreasing. We need health care comparable to what state employees get, seeing that we are considered state employees.
- I am not happy with the constant change instead of constant improvement of the health care, etc.
- We need a better insurance plan.
- Health insurance helped me this year. It might not be the best, but I'm satisfied.
- Coverage for families could use a little more research. People with children away in college are not getting the same benefits that can be found locally. It is unacceptable that only emergencies will be

attended otherwise they must return to town. This is unacceptable considering the premiums being paid for that child.

- Our health insurance is insufficient!! We need a lot of improvement. We are fearful of getting ill because we may go broke trying to see doctors and go to hospitals!
- It is incredible to realize that a teacher who is seriously injured by a student will be required to take their own sick days and then be pay docked for time off to recuperate from those injuries.
- The cost of insurance is too high for family coverage. Can anything be done? Every time we get a raise the health [insurance costs] go up. I want to [know] who is getting the kickbacks.

Appendix A

PUBLIC FORUMS AND FOCUS GROUP COMMENTS

F. Financial Management

- When schools write grants in partnership with district departments, downtown ends up dropping [the] ball and not following through.
- Need coordinated effort for grant seeking.
- South Hills missing text for AP history, missing materials for AP classes.
- Each teacher given \$50 per semester from building budget to order supplies with.
- Principals don't have training to budget.
- Big differences between schools.
- Base budget on number of kids previous year.
- Title I to get more money.
- Leadership.
- Parent contributions.
- It amazes me after 20 years to see the waste of the money the ISD has put into the Administration building, schools cannot even get some basic needs.
- It would be very beneficial if our budgets were available to us through the end of the year, rather than having to encumber the funds by mid-February.
- More support for money [for the schools].
- Not that good with money.
- Our school could use money bad!
- Our school is very poor looking, it's very small and everyone looks down on us.
- Our school isn't as wealthy as other schools, but with a little help from the district, our school can have more things and become a better school.
- Teachers have little to no input into budgets-principals spend discretionary funds at will without consulting [teacher's] needs.
- Teachers need to be able to know what is being spent in their department without feeling intimidated or threatened by department chair, etc.
- The administrators seem to always have the latest and best equipment when the schools are rundown and overcrowded.
- The reason we have less than a thousand is because it looks to us like we don't get enough attention from the district. There is green slime under the Amon Carter letters in front of the school.

- The schools need way more money in their budgets, especially in sports because there are a lot of kids and it is fun to get our bellies full after a game.
- This [mid-February fund encumbrance] is a big problem in my department as well...why is it other schools have access [to the funds] but our department does not?
- We need long term budget ability to get big items without losing over [(excess)] money at the end of each year.
- Budgeting is enforced throughout all organizations. Sometimes the students feel the "pinch."
- Using the computer in Internal Finance has been a great asset to the school.
- Everything was in place. I will be monitoring it more. We have been ahead that spending the technology money be associated with the school improvement plan. I agree. Generally, the Board has meetings in August at different times to approve the budget. It was announced in the newspaper. This year I was not able to attend. However it's open.
- We are on top. Our financial secretary keeps us informed of all changes and procedures.
- Special Education supervisors and diagnosticians are encouraged to limit services in IEPs so that the district will not have to use the funds readily available. They are told that there is not enough money, but no one will disclose how much money is available. Special Education funds need specific attention in the FWISD. Large amounts of available funds dedicated to students with disabilities are held back or used in general fund accounts. Principals are criticized by Special Education administrators, because they limit building level expenditures from their building budget. The problem is though, the principals are not told how much money is available and how to specifically access those funds. Are Special Education federal dollars being placed in the general fund accounts at the building level? Central office Special Education administration will not provide a detailed explanation of the Special Education budget.

Appendix A

PUBLIC FORUMS AND FOCUS GROUP COMMENTS

G. Purchasing

- Supplies: Usually get good support with materials, supplies, and textbooks.
- Have to purchase now for the entire year.
- No science supplies.
- [Textbooks are] inadequate and out of date. Our AP government books vary for the teachers and other students.
- At Rosemont MS, [we] don't have enough textbooks (use pieces of paper) or enough seats for all of the students. Kids stand or sit on the floor.
- Both schools need more storage room and a lot more books. Some kids are on hold for books and therefore they are getting behind on their assignments.
- Equipment and supplies at school are not what they should be.
- I don't think a lot of people understand the process of ordering and bids and all of that. I think that causes people to do a poor job of ordering what really needs to be used.
- I don't understand why some high schools have great weight rooms and equipment and others are falling apart. Equal education for all students. Band/Instrument-same.
- Kids were complaining because classroom was too cold, bought a heater and paid way too much. Schools are forced to buy from certain vendors and end up paying more than if they bought elsewhere.
- Money misspent.
- Need access to information on purchasing.
- Need more purchasing in football uniforms.
- Not enough money for extra curricular activities, half of extracurricular budget [goes] to athletics.
- Prior to school opening (High School), textbooks should be issued to returning students. Therefore, students will not be into their fourth week of school without textbooks.
- Purchase order procedure cumbersome; textbook problems-outrageous!!
- Textbook purchases are over-burdened by paperwork and procedures-books were ordered in July and this is the ninth week of school and students still do not have books. State adoption of books is not often enough, some books (government, history, science, etc.) are obsolete.
- Textbook shortage.

- Textbooks could be in order better.
- Textbooks? I'm still waiting on mine...TEKS? I would love to implement it more satisfactorily if I had state-approved texts to guide me!
- Too many "middle people" who don't or won't communicate procedures in the clearest manner possible...100 N. University makes it very difficult.
- We don't purchase a lot of things for the band-we need instruments and props.
- We lose quality consultants, etc. because the current pay procedure is ineffective and takes 3-4 months. The entire purchase order procedure is inefficient, cumbersome, and frustrating. It is too hard to access our funds.
- We need new football practice uniforms.
- We need to purchase new uniforms for the football team. Varsity and JV.
- We need long-term budgets to get big items without losing our money at the end of each year.
- Why does it take so long for schools to get newly adopted textbooks for books already approved for adoption? In elementary [school], corrective reading books last year took two months to reach the buildings and bilingual books have just recently finally made it into the buildings; some buildings even had to go to the warehouse to pick up books because warehouse didn't have the personnel to handle it.
- Some of the textbooks dealing with business could [be] updated for the times. The exercises are a little dated and should involve [a] more real world connection.

Appendix A

PUBLIC FORUMS AND FOCUS GROUP COMMENTS

H. Computers and Technology

- Services are a problem.
- No district-wide e-mail.
- Lack of support from administration.
- SASI is not doing what is supposed to do. It is not working. It takes more than ten times the amount of time to do a job. The process is cumbersome and training is an issue. There is no follow up training. The directions are not clear. Sometimes steps are left out of the directions. Level of training is not adequate.
- Each school develops their own technology plan so nobody has the same plan.
- We give lots of input but in the final analysis there is no action taken on our suggestions.
- Buildings are now getting wired and we were told we would get computers but that is not happening.
- It is difficult getting a straight answer from the technology department.
- We have \$3,000 in software but no computers that can run the software.
- Technical assistance is a problem districtwide.
- Schools do not have appropriate/stable wiring.
- Need technical support at the campus level.
- Each school has a technology coordinator who is paid a \$500 stipend.
- SASI is cumbersome. Many schools are still having difficulty with procedures. Tasks that were done easily with Columbia (schedules, attendance) are taking longer and they cannot get the types of documents that are needed.
- Directions for procedures are not well defined. Training has been provided, but there seem to be many "unwritten" codes that are essential to produce the desired output.
- Training may be an issue. Some individuals may need more in-depth training to do the sophisticated programming that is required by this program.
- Overall, it seems that some schools are having a lot of problems while others are doing quite well with the system.
- Availability of hardware is an issue:
 - Each school develops a technology plan. There is no current technology plan for the district, so there is no systematic process.

- Funds for technology are limited. Many schools rely on fundraisers, so more affluent areas of the city have an advantage.
 - Vocational education appears to be getting a lot of "up to date" technology, but there is little infusion into the regular instructional program.
 - State technology funds were used to train teachers, provide computers for teachers.
- Don't have full-time data clerks; PEIMS is a full-time job.
- Not equitably distributed across schools.
- Most in great need of computers.
- SASI has not been able to provide aggregate attendance for a six weeks period. Send scantron at end of six weeks; why are we completing information daily, and still having to aggregate attendance?
- Daggett Elementary School-haven't had [staff] training on SASI yet; most staff at other campuses haven't received training yet either.
- The technology department is not a clearinghouse of software information. People who want software need to do their own research to decide what they need it to do.
- Department chairs usually decide software to purchase; the person who wants it usually purchases the software. There doesn't seem to be a coordinated effort with the technology department.
- Teachers attend over 67 hours of training over the summer to get a computer.
- Computers can't support technology that's being purchased.
- One school - lots of technology; had TIF funds; has 5 computers in the classroom. \$65,000 plus district matching; all internet paid for; 50 something Wedgwood - 6.
- Trimble HS - Some schools have lines, but they can't get on. Lines busy.
- Distribution of computers is unfair. Teachers have to go to training in order to get computers, but if you already know about computers, you can't qualify, so you get stuck with an old computer
- Need technology plan; if there is one, many don't know about it. Also, the district isn't sticking to the timelines they stated.
- Schools make software decisions based on technology budgets.
- Whatever happened to the Deloitte & Touché report? They went around and counted all of the computers, did a big inventory, spent \$100,000 dollars and nothing happened.
- Superintendent has gotten the district more focused and on track; it's slow going, and they're trying to play catch up, but they're making technological progress.
- Make it easier to get a computer.

- Math and science departments put out.
- Email would be helpful.
- All classrooms have computers but use scantron.
- Computer in library-need a pass for library, can't always get a pass.
- Computers in every classroom (1-3) do not allow everyone to access the technology or allow the teacher to do a whole class activity.
- Every school should have a computer lab accessible by students for projects/work.
- Every student needs to be computer literate and functional in basic software.
- Grade reporting and class scheduling systems are full of bugs.
- Grades are repeatedly wrong.
- I have one computer in my first grade class that is used constantly during any free time. Since I have 22 ESL students in my class with the only support being one CRT teacher for reading (one hour per day), the computer gives the students more practice with reading and it would be very helpful to have more. If the district doesn't want to hire more resource teachers, computers would be helpful.
- I think computer software is just fine and [they] give a lot of practice if we want a computer job later in the future.
- I think teachers need more access to computers because we are not able to take advantage of what they have to offer.
- I think that our computer lab has to be updated because when I have a project that needs to be typed, I do not have access to a computer, and half of our computers do not work. And the ones that do work are in use, so I cannot turn my work in on time.
- I think the classes should have computers for every student.
- I think we could use more computers because not everyone has a computer at home.
- I think we need more computers in our classroom because we could do more stuff so we can learn more and we can think about our future when we get out of school.
- I think we need to work with calculators so we can get 100's every time, all the time.
- In computer classes there are enough for all, other classes, two [computers].
- One class requires that all work be typed.
- In library.
- In low budget and poor community schools and neighborhoods, I see a real and urgent need for more computers and software, in each classroom, especially elementary schools, so that our children can also have an early, solid foundation, and basic understanding of technology in the 21st century, therefore bettering their chances at life's vast opportunities, with confidence.

- In order for all students to become part of the technology world with computers and software and instruction. It must be provided for all students in all schools regardless of where the school is located. As soon as possible in all grade levels, pre-K to 12th grade.
- It's the usual complaint-never enough new computers, internet access, user training and tech services/repair. Tech services/repair is a real problem. Teachers need a lot of training in using/abusing the internet, AVP's, group presentations, documentation of sources, violation of copyright. Internet is not always the best source. Just because it is on the internet does not make it factual or true. The information explosion, especially in the internet, has made it much more difficult to separate fact from opinion or just fantasy. Internet training is needed. Internet is just another educational tool in the classroom. It works well with some types of learners, but learning styles vary just as teaching styles vary. I don't want the internet to become like videos and take the place of teachers teaching.
- Most of the classrooms do not have proper computer equipment in them. A majority of old 386K Apple computers still exist here. I feel that an internet accessible computer should be in every classroom in the district. If FWISD is so above and beyond most other districts, why do we lag behind in technology?
- My elementary age children are fortunate at Alice Carlson to have "computer class" at least one day a week. Each child has a computer. The teacher is wonderful, although he could use some help. So many questions to answer. My high schoolers on the other hand don't have that opportunity. It seems to me that they need this as much or more in the upper grades. Is it not offered or not available?
- Need more support for instructional technology for FINE ARTS.
- Not enough computers in Special Education . They are too old and the kids can only play games.
- Pretty good about fixing [the computers].
- SASI is HORRIBLE! Teachers are required to enter grades into SASI, but NOT all teachers have computers. Teachers haven't gotten any training on the system.
- SASI-pilot?
- School internet restricts too many sites. Interesting things are protected by BESS.
- Students aren't getting access to technology-they aren't getting enough (or any) exposure; one computer in an overcrowded classroom will not (and does not) cut it.
- There isn't much access to computers; we need to have more for the use of students.
- Transcripts are wrong; parents have to pursue every six weeks.
- We could use more computers and update them.

- We have talented students with interest in technology but not many technology oriented classes and experts on staff.
- We may need more computers and a little up to date in the classrooms.
- We need more and better computers and technology than we have now. We need some that won't break down easily.
- We need more support for all...come visit and see...our schools are behind, yet administration has new systems.
- We need more technology to prepare our students for jobs after graduation.
- We need new computers for higher learning and better-looking school.
- I believe as technology progresses so should ours pertaining to the school. In other words, we should always be updated with modern technology.
- Technology purchasing, curriculum development, instruction coordinator is totally a mess. The department and other administrative departments are not working together - as a result there is a waste of money.
- Individual teachers may not have time/ability to evaluate software for the subject area. There is a lot of very good and very bad software out there. Recommend an evaluation or recommendation grade/project/position to help narrow to the best software - possibly loan to individual teachers. At least compile a "best of" list for each subject area/grade level.
- FWISD is light years behind in Tech compared to other school districts. At the elementary level in our building the internet is available only through the library and the office.
- The I Can Learn Lab at DHS is a good learning tool to assist the students in learning algebra. DHS is working hard to have technology in place across the curriculum.
- The computer program for the business department is adequate. We are continuing to update the software for our students. Students' comments about the learning lab are positive. The district is working to place a computer in each teacher's classroom, providing that they receive training prior to obtaining the computer, which is great. Computers are available to students and teachers in the library, which is a plus.
- Instructional computers for applications have improved, but networking does need to be implemented. Networking would provide the students with a true feel of how the business would interact from computer to computer or peer to peer stations. The application classes could also use LCD displays so that a teacher could explain techniques on a classroom basis instead of individually.

- Instructional technology is getting better, but is still nowhere [near where] it needs to be. This school has not been networked yet, even though wiring was installed about three years ago. Science department has computers only because of a grant from INTEL. Internet is available only through computers (13 total) in library. Obviously 13 computers that are hooked to internet is not enough for a student body of about 1300.
- Our freshman computer science lab was using Tandy computer (5x-1000) until one year ago. We received an INTEL grant and they got us six-year old 486's. They need to be updated. We cannot use windows 98, because we have 8M [of] RAM. We were promised new Pentiums, but never received them. Lab cannot use any of new software. We need drops in every classroom. Entire network topology needs to be revamped. Our computer science is under deterring. They count our students, but we have never received any materials or supplies.
- Technology money - little disbursement at school level. Seems as if most decisions are made at district level.
- Very few modern computers are available for Special Education students. In a FWISD high school, the Special Education department has only purchased four or five Pentium level computers for a Special Education student population of more than 250 students.
- I think we should have more access to a computer and internet not only in library, but in the classrooms too.
- More computers have been added in the classroom, so students can have access.

Appendix A

PUBLIC FORUMS AND FOCUS GROUP COMMENTS

I. Facilities Use and Management

- Most of the time work orders are not taken care of in the appropriate amount of time.
- Management has been unresponsive; it is a department problem. The issue is the amount of work orders is too heavy or there is a failure to prioritize.
- Workers are on large projects and not available for small problems in schools.
- The roof leaks; they came to fix it; but when it rains again, the roof leaks again.
- Buildings that are old are not kept up on a regular basis.
- PM used to be assigned for a week. Now you are lucky if you have them two days. It is not fully staffed.
- MOC directors are never seen. The MOC directors just say "put in a work order," well, we've already done that...
- MOC directors are not doing their jobs because they are working on new jobs.
- (I) put in a work order to fix a tile one month ago (Sept) and it is still not done.
- How much pressure we use determines how quick the job gets done.
- Can't keep custodial positions filled; retention and high turnover is a problem.
- Paying custodians once a month is not desirable for low paying jobs.
- Principals submit work orders electronically. Work orders are then disseminated to the heads of divisions.
- Principals believe the problem is related to the work assignments of maintenance personnel. In their view, maintenance personnel are being used for district construction projects; thus, they are not available to handle the day-to-day maintenance tasks.
- There seem to be issues related to prioritizing maintenance tasks. Each principal makes a decision about priority. If a job is student-related, or is characterized as student-related, it is more likely to receive attention.
- Timeliness. Maintenance attends to emergencies, but not always in a timely way. Timeliness depends upon the insistence/demands of the person submitting the request.
- Principals were concerned because (a) maintenance is a drain on a principal's time, (b) service seems tied to "personal" relationships,

and (c) principals have to describe problems in extreme terms in order to get action.

- Maintenance "teams" assigned to schools have been reduced in size and capacity. Now they are primarily painters/carpenters. Electricians and plumbers are needed.
- Custodial services are under building control, so the problems are less severe. Still, principals reported (a) consistent vacancies, (b) small available labor pool, and (c) staff retention as problems.
- Consistent maintenance problems at a school generate parental concerns about the quality of education. Some principals felt that the "squeaky wheel" gets the grease. Parents in high socioeconomic areas are more likely to complain about maintenance, and in turn, to get action on issues.
- Principals have trouble getting maintenance orders filled.
- Orders that are not done in July are deleted and the schools have to reenter [them].
- Some principals indicated having to involve Board member to get maintenance requests completed.
- Maintenance staff spread too thin.
- Too departmentalized-when a staff person from the area comes to a school and he or she can't handle a request, the school has to start over.
- Limitation that schools can only choose one department when they do the work order electronically.
- One principal felt that the department was charging for labor twice from bids since the staff members are already salaried.
- One principal finally got her portable buildings.
- One principal just now got air conditioning in her gym.
- Problems with custodians.
- Not enough custodians.
- High turnover.
- Passing different custodians (those not doing a good job) from school to school.
- Custodial staff was working 7-day weeks for 1st 5 weeks to get new schools open/some physically exhausted.
- No substitutes when a custodian has to be out/overworks others.
- Custodians not equitable across schools.
- Space problems everywhere even with portables.
- Long waits in restrooms/cafeteria due to overcrowding.
- Some sharing rooms which isn't ideal.
- No extra room for tutoring.
- Older facilities pose health risks, as well as safety/security risks.
- Mold and mildew unhealthy.
- Old carpet.
- Tile in restrooms (can't get bad smell out after several years).

- Filthy air conditioning filters in portables blowing mess in classroom.
- Students/staff with sick headaches. Two schools mentioned: Stripling Middle, Oakhurst.
- One school keeps temperature at 65 degrees to keep mold from growing, but children and staff freeze.
- PM bus - comes once a semester.
- West park - 65 degrees all the time; 3 or 4 thermostats on one mainframe downtown; sections on different parts of the buildings are regulated by downtown.
- All of the AC units are from the lowest bidder; they don't work very well.
- Why don't we have soap at our sinks?
- Air quality problems at older campuses.
- Facilities - very clean but repairs aren't done in a timely manner...none of the work orders get done within a reasonable amount of time.
- Took low bid on AC units.
- Light bulbs-maintenance problem.
- Is maintenance working on new schools?
- Compare quadrants.
- Are all emergency response times logged?
- Porta-potties for parts of South Hills.
- Affect of tornados on construction? Bond proposal was on schedule until tornado, may be responsible for delays in some maintenance tasks.
- [Maintenance] won't take action on this issue because they (management) say that there isn't enough time/staff/resources for preventative work.
- [The school] needs to be bigger.
- [The] work order system does not have a feedback component so [that] when an order is put in, the school does not know if it is received, cannot get a status, etc.
- Bleachers not fixed in 5 years.
- Buildings are not ADA compliant (elevators).
- Classes and halls orderly.
- Classrooms are small and overcrowded at the HS level.
- Custodial services vary from school to school.
- Custodians are being managed well enough, in the past there was no accountability.
- Custodians are excellent.
- Custodians take good care of the school.
- Custodians that actually clean the school [are needed].
- Energy audits should show opportunities for savings if coops are requested.

- Energy Management program has been able to produce savings, but in some cases, this could be doubled.
- Facilities are overcrowded.
- Forest Oak-Carter Park schools, the buildings are sick, makes students sick.
- Give my teachers rooms please.
- Great maintenance staff and custodial staff-except for the bathrooms.
- I applaud the custodians at DHJ, they are like family and can always be counted upon. Thanks!
- I believe the school needs more money to be enlarged for the sake of the kids. There is so much less space in the school to accommodate for the kids.
- I feel as if they should leave both of the restroom facilities open for Success students.
- It would be a boost to the Success program to have [a] building for its own use. A day program would reach the needs of more students.
- Maintenance personnel in school [is] low.
- My school is falling apart already.
- Need to fix restroom because the doors don't lock. Just everything needs to be new in restrooms.
- Not repaired in a timely manner, not clean.
- Over this fall I have heard many suggest combining the FW schools-and making five or six large schools-which would utilize staff and resources better and be more cost effective. We could compete more in 5A and the poor schools who have 15 band members or ball players would have a better chance at success.
- Please consider keeping all class sizes to 22 or less-not just 4th grade and under. A teacher can handle the class better, discipline is easier and the children get more attention and can learn more. It is worth the extra salary money to ensure less discipline problems, more learning and better test results. Look at the big picture.
- School is undergoing major facelift and additions. Need to make sure that a proper "teachers lounge" is added along with kitchen appliances. It's sad to have to eat and drink without the chance of cleaning up before doing so and having to sit in a room with computers or copiers. It should be a place of relaxation for teachers on their off time.
- Success needs its own building. I have only one plug in my room, but I have lots of stuff I could use if I could plug it in.
- Success needs our own building.
- The building needs to be bigger. A bigger cafeteria and more classrooms.
- The custodial services are good-they do a good job and are friendly and will do whatever is needed.

- The custodial workers do a terrific job at taking care of the schools.
- The custodians are real nice and they do a good job with the school.
- The FWISD does not practice and does not have a preventative maintenance program. Because of that, the HVAC equipment fails prematurely and runs inefficiently. We have EMS (Emergency Management System), which schedules the HVAC systems operation in the schools. Unfortunately, approximately 50 percent of the HVAC equipment is either jumpered or not controlled by EMS. Many of the AC units run 24 hours per day, 7 days per week. We have an Energy Management program that is basically implemented and successfully executed by the principals, teachers, and custodial staff. Computers and lights are turned off after school hours. AC unit thermostats are turned off or set back after school hours. Unfortunately many big units like air handlers, pumps, and kitchen equipment run continuously. Custodial staff is not provided with the procedures, recommended by manufacturers, allowing them to [be] effectively and safely shutdown and start up big energy consuming equipment when it is needed locally. Practicing inadequate shutdown and startup leads to equipment failures. We need good directions and procedures from the experienced HVAC engineers to get all maintenance departments to work together and help schools and custodians work as a team. With already existing efforts by principals, teachers and custodians, the additional needs of replacing old equipment, tying all equipment to the EMS, establishing and implementing preventative maintenance, and providing daily/weekly equipment shutdown and startup procedures, as needed, to custodial staff would greatly reduce energy waste and save money for the district.
- The office area is far too small for a school of this size.
- The school is in good shape, I love it here and would never go anywhere else. The custodians are cool and deserve a raise!!
- There are no preventative maintenance programs. Coils are dirty [and] air can't get to chillers. Maintenance will fix [it] when it breaks down, but have no training for preventative activity.
- There are no procedures at the school level for turning on and off the equipment. Maintenance is unwilling to provide simple steps to custodial staff. [Maintenance] doesn't believe they are capable. As a result, the EMS systems, which should be automatically shutting down in evenings for savings, have been deliberately overridden to keep them running around the clock.
- There is a lot of finger pointing when something breaks down. There should be more teamwork between maintenance and janitorial staff.
- They should try to fix the school better, because it looks like trash.

- Time frame for the completion of new building grounds and upgrades.
- Too cold. [It is] difficult to work when [it is] freezing!
- Too few restrooms.
- Use of management is very good. I even talk to the custodians.
- We have efficient and excellent custodians at DHJ!! We are currently enjoying a building expansion which will greatly improve our capacity, and comfort level.
- We need a bigger school, cafeteria and more classrooms.
- Well maintained.
- When two schools share the same facilities, it becomes difficult to manage materials. One school tends to blame other for missing material.
- Whose idea was it to build for current need? New buildings are overcrowded the day they open. (What's more-why did FWISD school board give \$7.5M to a management company to oversee a \$310M bond issue and allow a district level administrator to oversee the construction as well? Is he being paid extra?)
- Maintenance is too slow after requests - Locks to some doors have not been fixed for over a year. This is unacceptable.
- I, being a track runner at Dunbar, most definitely think that the track is just inappropriate to run on. It really is in bad condition. Last year I hurt my legs because of running on this cheap track. What all need to do is stop being cheap and get some appropriate equipment for the track because some people don't have rides to Clark Stadium. Thank you.
- I think the overall appearance of the school is okay, but some of the lockers by the cafeteria and old wing of the school need to be replaced.
- Building capacity - I guess this means "Is the building sufficient to deliver good education." Dunbar is inadequate. We are due to get new rooms (labs mostly) from current bond. Teachers requests for how labs should look were mostly ignored. Our custodians work hard to keep our building and grounds clean if not beautiful.
- How long does it take for the A/C in the gym at NS to get fixed? It's been several years since it has worked properly. Parents and community persons have complained about it. Girls athletics and Boys basketball games are unbearably hot... it's ridiculous! It needs to be repaired!
- I feel that the construction and the renovating of the new cafeteria and field house took much too long. While our classrooms are so crowded.
- I feel that the classrooms are crowded. And the air conditioner is not good at times.
- Present ongoing bond issue will expand or renovate many facilities that need it.

- Temporary out buildings need better maintenance at SW school.
- Facilities and landscape need major upgrading. Going to other districts and seeing their facilities tends to make your school seem second-rate compared to the others. There is no sense in the track athlete's having to find a ride to Clark stadium to practice when there is a track at their school, but because of the condition of it they have to find a place to practice other [than the] school [that] has a paved surface (blacktop) and our track hasn't been upgraded once; it's the same as when the school was first built and then not right.
- The building is always clean. The custodial and cafeteria staff do an excellent job.
- The custodial services at DHS are great. This is a nice, clean building. Cleanliness is stressed by principal. The building, grounds are quite attractive.
- The planning of the computer lab could use a little help. The setups for the computers we have are not adequate. There are too many cords in sight and potential dangerous trip zones.
- The building is clean, custodians do a sweep each period which is great. Our restrooms have tissue in all stalls daily (Great). Custodians are friendly. Rooms are cool.
- As a whole, the campus really has made quite a few improvements this school year. Certainly the overall appearance is better than over the city!
- There is no one at TEA overseeing Texas School Districts compliance with ADA - TEA referred me to "my local 504 coordinator." The 504 representative only addresses concerns on a "per student" basis. Not district compliance. We do not have even handicap parking on all our campuses (hardly a big expense). Many schools have no front door access for the disabled. Going to an alternate entrance is reminiscent of segregation in the 1960's and is not acceptable to students, parents, or staff. I am a parent with a disability and have a child in FWISD who also has a physical disability. We have wrangled with access issues in a number of district facilities (and schools). There is no one knowledgeable person (or committee) overseeing ADA upgrade. We have seen some unwise choices made at the expense of safety. (A lift with no enclosures was going to be installed on a set of stairs instead of ramping. It would not have served semi-ambulatory populations or facilitated independent mobility as an aide would have been needed to operate it). ADA compliance has been hit and miss with those who knew the law and [were] hot to advocate getting results and others not. There is bond money available now and we want it used wisely. If not, we will hear once again that "there is no money for changes."

Appendix A

PUBLIC FORUMS AND FOCUS GROUP COMMENTS

J. Transportation

- There is a problem getting buses to school on time.
- There is a problem getting buses for extracurricular activities.
- There are not enough bus drivers.
- The pay for bus drivers is not enough to attract and keep them.
- The TAP students are on the bus for two hours.
- Field trips must be done from 9-2, which is very difficult.
- Principals have a problem getting buses on time.
- Principals have difficulty getting buses for extracurricular activities and field trips. Buses must be available for regular bus runs, so other transportation needs must fit within a restricted time range (9:00 to 2:00). This is particularly a problem when athletic events involve schedules with other districts.
- Buses don't show up on time. Principals are not informed about delays, so they must call to find out what has happened to buses.
- There are problems with the transportation of Special Education students. Spending too much time on buses.
- Transportation problem seems related to a need for (1) more buses and (2) more drivers. It's hard to get qualified bus drivers at the current salary.
- Sometimes have problems with field trips, but are isolated problems.
- Principals indicated that they received immediate responses to regular problems.
- Principals on the far side of town mentioned some limitations and problems related to field trips since the buses must take them between 9 and 2. Sometimes it's difficult for schools on far side of town to be able to work in these times and their children sometimes miss out on things (i.e., traffic problems make them late, etc.).
- Bad! No extra bus for football, routes dropped, kids missed for a few days, short on buses.
- Buses are not very safe in my opinion. Too many children, only one adult, the driver, responsible for them. It has been my observation; they are not always on time. Because of the two things I've mentioned, we don't ride anymore.
- Buses run late, take a lot of time.
- Can't have enough drivers. Some places students are not picked up.
- Deaf kids spend a huge part of their day in transit because from all over they come to one area (not allowed to go to their home

school). In addition to a 7-hour school day, many spend an extra 2-3 hours in transit! The air pollution is bad enough!

- Getting a bus for trips, whether extra-curricular or other, is almost impossible. This is ridiculous.
- Need extra buses for field trips, i.e. buses that do not need to run routes and are available and accessible at all times.
- Not enough buses, kids claim to ride up to 40 minutes.
- Parking lot problems, morning time especially, most staff are very nice.
- The transportation system needs to be improved. In my neighborhood if a bus driver does not show up for work, the students are not notified. They either have to find a way to school or stay home.
- Transportation on time.
- Two miles from bus stop, dad drops off, walks to relative's after school.
- Yes, we need extra buses.
- A new bus stop for my neighborhood would be nice.
- Teachers and schools must pay for buses for field trips (\$1.00/mile) and schedule trips around the regular bus route (between 9 and 2 only).
- The bus drivers don't have directions and never seem to know where they are going. It's very frustrating because we don't know when to tell our players and their parents and the crowd we are going to play because it all depends on if and when the bus is going to show up.
- The bus system here in FWISD is terrible. They are late and we can't even get one until 5:00 so it makes us late for our games and then we get home late even on school nights.
- The bus system is lacking to be kind. They seem to be able to meet most general transport needs during the school day, but any extra-curricular activities are hampered due to excessive lateness and being inaccessible when attempting to reach them.
- The transportation is just terrible and I am a student that is always late-that holds me 20 minutes from my learning.
- Transportation is fine.
- Transportation is good, but could be a little bit more on time.
- Transportation, as in being on time to transfer students to other school events, is terrible.
- We need better transportation. Kids from Carter and Riverside are waiting hours after school for a bus to pick them up. Also, when there are games the buses are hardly ever here on time so we get to our games real late.
- Would like to see that transportation is provided for students who are involved in more than one sport on the same day. Golf students had to provide their own always - why?

- Success high school needs [more] buses for students to come to school.
- Bus service is efficient and calls to transportation department are handled in a timely manner.
- I have a Special Education student that rides the bus. [The] transportation department waits until the Friday before school starts to issue [a] schedule to parents. My child goes to a school 22 minutes away and he was scheduled to be picked up one hour and ten minutes before school even began. After calling about this, it was reduced to one hour. This is outrageous that an ADHD student be made to sit on an hour bus ride living only that short of a distance [from school]. Why can't all buses have two adults on them, one driver and one assistant - Special Education is the only department that does this. Field trips for schools can't be scheduled too early, only after 2:00 p.m. because of route schedules. FWISD bus drivers are excellent; I've not had major concerns about the drivers; only the decisions made by the administration.
- Why do students have to live at least two miles away before the bus will pick them up? I wish all buses had at least two adults (one driver) (one attendant).
- Discipline on the bus can be improved.
- Transportation services need supervising worker by security staff [to] enable [drivers] to have [an] eyewitness for the employee. Safety to assure them their job. The schools should take responsibility for any children's action on each bus route. Included, the bus driver should take responsibility to report the fact to [the] director of the schools and administrator. Children should remain quiet on the bus or the school board should make radios [available] a so policeman can hear the action and also have the student report back to their local school.
- Many Special Education students have very long bus rides to their schools and programs. It is common for students with disabilities to have a one-hour ride to school and to home. Many have one to two hour rides to and from school.

Appendix A

PUBLIC FORUMS AND FOCUS GROUP COMMENTS

K. Food Service

- Teachers pay two times as much for the same amount of food.
- Some cafeteria's food is good and some [is] not so good.
- The kids like the way the food is outsourced.
- Quality seems okay.
- Outsourcing to Pizza/Taco Bell seems to work well.
- Too federalized.
- Real meals are gone; what happened to real meals? (e.g. can't have mayo or mustard on a hamburger).
- Twelve digit lunch codes - lunch ladies tell them they can't eat if the kids lose their codes and can't remember the numbers.
- All depends on the cafeteria manager - good cafeteria is driven by the manager.
- [The cafeteria was] out of food after waiting 15 minutes. I ate something I didn't like. Our cafeteria is too small; I have to sit elbow to elbow with somebody!!
- [There are] not enough sales in cafeteria; [students] should eat first-[but the cafeteria] runs out of food so [the students] sneak off to eat-[this is] dangerous; was a problem years ago.
- Lunchroom, Subway, Pizza Hut, Taco Bell-out of everything but candy bars and chips.
- One hour period-30 min. advisory, 30 min. lunch.
- A salad bar would be nice!!!
- At Riverside MS, the food is just terrible.
- Cafeteria staff works very hard with what they have. As far as nutritious alternatives, we are very lacking!
- Catsup is a vegetable? Very poor nutrition at high school level.
- District should consider bringing Taco Bell-Pizza Hut-Subway into schools to cook and sell on a daily basis, eliminating [the need for kids] bringing in these items from outside. Items are cooked fresh daily. Eliminates problem with students trying to go off campus, since this is a closed campus.
- Every school should have an hour of lunch instead of 30 minutes because we do have to go to our lockers, and the lines are too long.
- First lunch is the shortest lunch period.
- Freshman should be able leave [for] lunch as long as they are with juniors or seniors
- I agree that we have excellent cafeteria personnel but we need more variety in the food.

- I also think that we need longer lunches, because by the time we leave the school and order our food it's practically time for us to come back to school, so we won't be tardy.
- I hate to see all the fast food places sponging up at the schools. I also hate to see all the coke machines available at lunchtime and in between. (They are ok at extra-curricular activities). The emphasis at school is for good behavior and good test performance. Shouldn't we feed our kids like we mean it? Do you think a child who has had a 32 ounce soda, french fries, and a candy bar [for lunch] is going to behave or perform at his/her best? Do junior high kids-existing on cokes only (at lunch) behave or perform well in classes after lunch? I know that the schools make money on the machines, but are we here for the schools to make money or to educate our kids and do what is best for their minds and bodies?
- I think that the food could be better.
- I think that they should lower the prices at lunch, because some people's parents can't give them three to five dollars a day for lunch. I also think that they should let freshman and sophomores go off campus, cause I think that freshman are very responsible-at least let them go to the chicken snack or something.
- I think the students who are making good grades and not skipping classes should have the right to have a pass to go off-campus for lunch.
- I would like other foods like tacos or pizza so that our kids would not leave the school.
- In the high schools I wish we could just contract out to "fast food" franchises. The quality of the cafeteria food is not very good. Students don't/will not eat it. Government regulations about what is served/ingredients, etc. have contributed to low quality. Cafeteria staff is low paid. There is a huge amount of waste-look at our trashcans at lunch. Many of the high school students leave school legally, or illegally, and make a run for the fast food spots in the neighborhood. Many are late returning, car wrecks happen. Also, it is almost unenforceable to keep underclassmen from leaving school at lunch.
- Juniors and seniors need to have the opportunity to go off-campus.
- Juniors need to have an opportunity to have off-campus lunch because back in the days, juniors and seniors went to off-campus lunch. And plus the juniors are at a maturity level and they deserve to leave for lunch.
- Lunch at school is very bad! In the cafeteria line, because it is very, very gross! Nothing that they feed us is really appealing to us. It doesn't even really fill us up! It seems old and dry!!
- Lunch cards-lower money on hand to be stolen from person.
- Lunch is too short. We need snack machines, a longer passing period, [and] bigger lunch room.

- Lunches are [priced] too high. Freshman and sophomores are to be able to go off campus. Lunch needs to be longer. We need snack machines, longer passing period. [They should] spray trashcans outside.
- Lunches should be longer, time is limited for seniors who leave.
- More variety!!
- My junior in high school leaves campus. My freshman rarely gets the chance to eat. She complains [that the] lines are too long, food from the contracted restaurants is gone! Help!
- Need more lunch snack carts.
- Need to serve better food.
- Okay.
- One hour should do, because the lunchroom is too slow and lot of kids don't eat at school.
- Sodas are too high.
- Some kids are a little too loud. If you smell, do not come to school.
- Students complain about quality and the variety. There is no variety.
- Students should not be punished because they do not receive reduced/free lunch or if they forgot their lunch money. Why does the student only get a dry peanut butter sandwich? The schools much rather throw the food away instead of feeding hungry children. Also if an adult purchases a lunch and pays more for the lunch than the children, why is the adult served the same amount of food? Why not pay the same amount as the students? The adult receives the same amount of food.
- The cafeteria food tastes bad. So I leave schools at lunch. Their food is too salty and too sugary sometimes.
- The EHHS food service is excellent. The food is quite good with excellent choices and variety.
- The food could be better and fresher. Cafeteria ladies are nice.
- The food is all right; we should have more variety.
- The food is good.
- The food tastes awful.
- The women who take care of our kids are great! DHJ has the best group of caring, loving, supporting food service staff in the state!!
- They need to get better food. Half the kids won't even eat here because it is so bad.
- They need to give a survey on what the kids would like to eat.
- Thirty-five minutes is not enough time to eat and visit with your friends!!!
- Too much grease-FAT-bad food combining techniques, another health hazard. Bad food combining is the start of colon, gastritis and many other ills of health. America needs to eat for nutrition, not for taste. I would like to see better food combination planned

meals-less fat, grease, butter, and sugar. Lookup Proper Food Combining

- We have a small variety of foods. I think, or hope, that in the future we can improve a lot.
- We have an all right food variety but we need more cause there aren't enough food selections for the amount of money each person has (not everybody is blessed with a lot of money) but if we were open campus!! Too strict on what we eat and sides we have.
- We have all right variety of food, but it could be better.
- We need more things [to eat] beside that same pizza.
- We need seconds for free but only pay \$ 0.10 at Riverside, we need more food.
- Would prefer more effort in better nutrition-tasty vegetables and meat more often-would not mind paying more for each meal-program needs to take a giant step forward to insure the health and well being of our citizens going into this new century. Costs increase, yes, but it will still be affordable and nutrition with our young generation in this new modern era is sadly neglected. We need to aggressively work to improve the life and well being of those we love. Take a leadership role, be proud and progressive. Healthier people learn and produce better.
- I say we need more choice of food, different everyday, that is hot and fresh new just made. Also lots of it too. The food is good of course, but I say just more for less. I get hungry, I mean very hungry.
- Meals need to be more nutritious or consist of more "real" food instead of hot dogs on bun, etc. Variety would be nice in the food department also. We are tired of chicken fried items 3 times a week. Right! Right!!!
- I think the food selection is fine since not many students eat in the school's cafeteria, but it would be nice if we had more choices of food to choose from. [I] think, more people would eat at school if there were better food (with real meat), and also because its cheaper. Real food for real people.
- Better food.
- I want real meat, real fruits, real desserts, real milk, real water (clean)!
- Students with free lunch can't get salads in lieu of a hot meal.
- Why does free lunch federal funds determine the quality of foods and types that are served? The types of food being served are very poor and not kid friendly. I totally believe in proper nutrition, but if you expect kids to be consumers, they need to be presented with a decent product to purchase.
- They need to make sure there is enough food to go around; maybe they need more time.
- I like the menus in English and Spanish.

- Food is hot when served, according to children.
- Students like Pizza Hut and Subway.
- Cafeteria ladies are friendly.
- We have a cafeteria staff that surpasses all others. They are great!!!
- The cafeteria facilities are great. A great manager and staff members-friendly, clean and hospitable.
- After eating in several school cafeterias, the food is better prepared at Dunbar.
- We need a McDonald's, and a Grandy's in our school!!
- Cafeteria facilities are great. The quality of the food is good. However, more of a variety is needed. As to the drinks, -supply should be unlimited- -juice, tea, etc. Water should be available in pitchers with disposable cups available at each table for students. Ice cream should be available at all schools.
- Facilities - clean, orderly. Meal Participation - only those who have to stay at school and eat it (9th and 10th grade). Quality - ranges from poor-average. Nutrition - well balance.
- The cafeteria food service is fairly decent as far as the service goes. On the other hand, the food could use a little more interest, by having a variety of foods for those that might not agree with what they are serving that day. And the quantity is also important as far as food being purchased. The cafeteria tends to run out of food to purchase.
- However, Dunbar is a decent school. I really think that if we had more variety of food it would be more interesting.
- The cafeteria food needs help. One line will have, for example nachos and pizza, what is the nutritional value of that lunch? The other line guesses the meat. The quality of food poor. Ask any student.

Appendix A

PUBLIC FORUMS AND FOCUS GROUP COMMENTS

L. Safety and Security

- Security is not as strong for elementary as secondary schools.
- Security is a big concern because there are no police liaisons - this is a police department decision.
- There are 17 schools with no assistant principal (not because the position isn't filled but because the position is not available). Principals feel this is a real problem since no one there when they have to take care of emergency or leave building for meetings, etc. Also Principal has to do all PDAS. Feel standard for having assistant principal should be lowered.
- Would like emergency button in each classroom.
- Schools rehearse for emergencies.
- Need phones or email to facilitate communication between classrooms.
- No apparatus at elementary schools or at all middle and high schools-equipment is random.
- No back packs are allowed to class at some schools.
- Doors open at all times, parents are supposed to check in at front office, but not all do.
- Briscoe only allows entry through two doors.
- All middle and high schools have cameras in the hall.
- Teachers were locked in portable buildings, couldn't notify anyone because there were no phones.
- Two persons per hall have walkie-talkies at Leonard, Carter Riverside, and Briscoe.
- Alternative education is black and brown. There is no in between. My son tried to break a fight up. One of the boys turned on him. Now I'm faced with a \$250-\$500 ticket. I'm a grandmother. The state pays \$1.42 a day, per child. How am I supposed to pay the ticket? The teachers don't try to stop the fights. Zero tolerance policy is not working. There's no room for judgment. Alternative education should not only be just black and brown, but should be on home campus. Where's the help for the grandparents? These children come to us with baggage. The schools are not trained to handle the problems. We receive no help from the state (\$1.42 a day). So their children go to school without so much. All they hear is I can't afford this. They see, they live in a real world. They (or I) feel like an outcast. We're here and our numbers are growing. I'm putting my life in my grandchildren. I don't want to go to TDC to see them.

- Alternative education program staff needs to communicate with home schools.
- Arlington, Southwest-good.
- Attitude seems to be let the kids fight.
- Block schedule.
- Carter Riverside has the best security.
- Discipline - OCS/SAC/Detention (whatever - name is used) is not being used effectively. Kids should dread going-they're not-it is a way out of class-it's no big deal to them. They should have to work-copy from the dictionary-write a 50 word report-something other than "sit and be quiet" or do your homework. Where is the punishment?
- Everybody leaves at once, key cars and throw trash in the yards.
- Gangs at OD Wyatt, South Hills.
- Good interaction with FWPD.
- Great, one guard full-time to ask for passes.
- Have gone to pick up my child after school sport practice late-NO official at school till all [students] are gone; have seen three fights- tried to break up two at middle school.
- I disagree with us having to wear ID's, because if we accidentally forget them we receive an infraction. To me that is a little drastic for something so innocent as a piece of plastic! I also think they're too strict about certain things. They also are very unorganized. Sometimes we don't get information we need until a week later. We also have too many hall monitors, it seems as if we are in jail. The school is also a bit overcrowded. I think [that] when they knew [there] were too many students they should have stopped accepting them. This is also a safety issue, because it's hard to get through the halls or up the stairs so we could hurt [ourselves].
- I do not feel safe at this school. With the characters that walk in here on a daily basis, combined with the ease of entering or leaving school without being noticed, I could easily see a catastrophe in this school's future.
- I don't understand the code red thing we do in case a gunman comes to our school like at Columbine. Because what if there is a kid at school who knows what the code red is and they tell the gunman or what if the kid is the gunman.
- I feel that Eastern Hills has gotten a little too strict. They are more worried about whether or not we are wearing our ID's than teaching us. I feel that that we shouldn't have to come to school and feel like prisoners. They take all of our activities away and punish everyone for reasons that are unknown. I feel that wearing an ID is not going to keep an intruder out of the school, all they are going to do is write the person an infraction and give them a temporary ID We have too many hall monitors, it is not necessary, and they treat us like criminals. Eastern Hills is more concerned

about pleasing the district rather than teaching us the skills we need, and they wonder why we're not above all the schools in academics. We need to focus on our education, rather than getting suspended for something as small as an ID, which is going to only keep the student from excelling.

- I feel that the security is good here; however, if they could have teachers or any of the faculty with a free period or time monitoring the halls or lunch breaks, it would help the security at the schools.
- I think the safety is good-we have law enforcement officers at our school and they stay for school events. I feel safe.
- I think the safety is great.
- ID cards do not keep people out of this school.
- If we break or lose our ID's we should be able to get a new one instead of paying \$3.00.
- It is too crowded in the hallways, it is hard to get from one end of the hallway and go to the restroom, which in the opposite direction, in 6 minutes.
- No lockout; it hurts; it does [nothing].
- OD Wyatt-not safe.
- One security officer per school.
- Open district allows 11th and 12th graders to leave at lunch, difficult to enforce.
- Our principal has undergone a number of challenges this year. During the first of the school year, we experienced a number of conflicts [that] failed to disrupt the classroom activities. I was glad to be at a school where the leaders looked at the safety of our students and staff members. We have been cautioned about reviewing our "Handbook" for safety and asked to inform our students about safety. It has worked. During the fire drills, our students follow the instructions provided. Hopefully, all of our school will continue to address safety through the schools. However, I have been concerned about the support or the appearance of key school officials present after several bomb threats and fights, especially after added security was requested.
- Our school has really good safety. No matter what, someone always stays until all students are gone, even if it is after a football or volleyball game that is late at night.
- Parents are forced (punished by court and fines) to send children to school (a governmental agency, a state institution) where we are forced and made aware of the fact that should anything happen-NO ONE is responsible and then the district wants to know if we feel safe? Only in elementary school!
- Pregnant Students should not be allowed to participate in certain school extra-curricular activities.
- Pretty safe, drug dog used to come in once a week, has not been in this year.

- Riverside Middle School needs to listen to kids instead of ignoring them and sending them to the office when they didn't even do anything wrong. The teachers need to listen to the kids and help them rather than not showing concern.
- Safety [is] good.
- Safety and security is good. All of the security guards and police officers are great.
- Safety is good; the police officers stay till we leave.
- Safety is great.
- School year - May-Aug locked in utilities were turned off during this time, if [we were] concerned [at] all [with] savings, why pay custodians during this time - why close two weeks during Christmas? Pleased with swim team, soccer team, band, etc. - no safety issues to complain [about].
- Schools are safe.
- Some student disciplines are too harsh. Too many police in the building. It sends out the wrong messages.
- Sometimes there is concern for safety when it comes to extra [curricular] activities. The administration takes every precaution when it comes to group activities.
- Spend time with the students to see what is going on in their life. They even sometimes keep a regular check-up basis on some students; now those are officers of the law!
- Student discipline policies [are] not consistent, no room for consideration of student's past.
- The dress code is too strict. The campus monitors are too verbally abusive. And sometimes the school is so packed that we can't get to class on time. Another thing is that when you come to school after 8:30 you have to stay in the Auditorium. It seems that they don't want you to learn. Back to block schedule.
- The students who drive are not courteous when driving. Need police patrol to direct traffic.
- There was a student smoking marijuana and admitted to it. He is a major problem in the classroom and according to federal law should have been sent to an alternative school. Someone high in administration sent word down that he should be accepted back into the classroom.
- Too many 10th graders.
- Truancy is still a problem here. Instead of giving a fine to the parents, give it to the child. If they do not pay the fine, put the child in jail or the detention center.
- We have a safe and secure school; I hope it stays like that throughout many years.
- We have a very safe campus because the security guards we have are very cool and very down to earth. We have nothing to complain about our security.

- We need on campus alternative class rather than sending students away.
- We need to have the metal detectors while entering every class so we won't have to wear ID's.
- We understand "zero-tolerance" but there's got to be a way of weeding out your big troublemakers from an individual that makes a mistake, like accidentally carrying mace in her purse-protection student uses because of a night job. District takes quick action to suspend but takes forever to hold hearing and clear student's problem before suspending.
- Well what I think about the school's policy, is they don't need to be giving us school ID's, dress codes, in-house [suspension]. That's what I don't like about the school policy.
- When a student is suspended, instead of sending them home, I feel that "in house" suspension would be best because 1) kids would be supervised at school, 2) not at home alone or roaming the streets getting into trouble, 3) would do their homework at school with assistance if they needed it.
- You also need to improve on school security, because we have too many riots here.
- Zero tolerance act has got to go, we're not prisoners.
- Zero tolerance is a joke-it isn't uniformly applied and lacks common sense!!!
- Parents should respect laws when dropping off students. They will park or stop in no stopping/parking areas. Students learn to disregard rules by observing parents. (I recognize this is a generality.)
- Student and teacher safety needs more attention. Perhaps the local law enforcement could be more involved in school safety.
- I don't think that it is fair that we can't have pagers or cellular phones if they stay out of sight and are on vibrate so they won't disrupt the classes and we can use them on our lunch period.
- Students should have stricter rules and they should be enforced [in] return. [We need] more functions as rewards for following the rules (i.e. dress code, profanity and cheating).
- I feel SAFE! I do not feel threatened while I'm at school. This is the first school where I feel real safe. I know that when I come to school, I don't have to worry about guns or really any kind of violence. I have not seen any type of violence since I've been enrolled at Success High. Unlike other high schools where it is common to hear of a fight or [even] see one.
- FWISD's office of student affairs is outstanding in its organization and support of the need of the schools!
- At NSHS - the principal locks all doors during lunch while the students are outside - even teachers are locked out.

- [I] would you like to see more drug dogs do random check of campus parking lots, - lockers. Have surprise metal detectors at least once a month.
- I wish there were a program that would educate our teens about the dangers of guns and drugs. I would like a program like Scared Straight.
- When people get in a fight three-day suspension is not enough. They should be expelled.
- Safety and security is to protect the school with patrol service [and should] enable good behavior for all student conduct. Use law enforcement to protect our children from drugs and gangs [and] also other criminal sources.
- When disruptive students are suspended with a strong offense, those students should [go] to an alternative setting for the remainder of the school year. When they return they start all over again continuing to disrupt.
- Think that the security should be stronger meaning when there is [a] fight, teachers and other students shouldn't be hurt during fights. Instead of some security or monitors walking away, they should break it up quick. To me, as a student, sometimes I don't feel safe.
- Student discipline could be a little stricter. Disruptive behavior of a few is taking away from the task of sharing knowledge.
- The school district should have more security in the schools and school grounds. Also, in the process, [the district should] treat students [when] they have violated rules. They have to suffer the consequences. They are keeping other students from getting an education.
- A discipline plan and a safety plan are in place at DHS. A crisis plan is also in place. We have crisis drill every six weeks.
- Providing a safe and comfortable environment for the student to come and learn is a must. The ones who come just for a place to go please send them somewhere else. Provide more police officers on campus so they won't identify [a] police officer as the enemy, but as friends.
- Student discipline policies make getting problem students out of school so difficult that school is pretty much disrupted until all disrupters have been "third-partied" out. Then the same students return the following semester to start the cycle again.
- When a student is suspended they should not be able to return to their home school, when the offense is a very disruptive one. Students know they can return and do.
- I mind [students] leaving for six weeks. Being third partied should mean never being able to return.
- I would like that every adult in the building would have the right to the discipline policies [so] that if a teen was rude to you or cussed

you out you could write them up to have them disciplined. A lot of time the teens will act very rude or say something and will look at you like you're nothing just because you have a title other than "teacher."

Appendix B

COMMUNITY SURVEY RESULTS

Summary/Perceptions

The Fort Worth Independent School District (FWISD) community survey is based on the results of 650 telephone interviews conducted in English and Spanish with residents of the area served by the district. A random sample of households drawn from all zip codes served by the district was provided by Survey Sampling, Inc. Interviewing took place November 9-27, 2000.

The primary objectives of the FWISD community survey were to:

- assess the general perceptions of the district among residents living within its boundaries;
- measure the level of awareness of district programs and services;
- measure the enrollment rate in district schools;
- assess public perceptions of the quality of education in the district;
- assess public opinion of fwisd schools and school-related issues, and identify underlying reasons for these perceptions;
- assess public opinion on the efficiency of fwisd operations;
- measure any differences in opinions between the respondents with a child or children enrolled in an fwisd school and those without children in fwisd schools;
- measure differences in opinions across racial and ethnic groups; and
- develop a demographic profile of fwisd residents.

SUMMARY RESULTS

Significant findings of the community survey include:

- The majority of households that include school-age children show these children are enrolled in FWISD schools.
- A majority of respondents say that the quality of public education in FWISD schools is either excellent or good.
- Six in ten district residents agree the community is proud of the public education provided by FWISD. Almost an equal percentage agreed that FWISD graduates are prepared to go on to college or the workforce when they graduate.
- Ratings of FWISD trustees and administrators are moderately positive, with an average of 58 percent of respondents giving them grades of A or B.

- Ratings of FWISD facilities are mixed, with most households agreeing that FWISD schools are good places to learn and are clean and well-maintained, and fewer agreeing that FWISD schools have sufficient space and facilities to support the instructional program.
- District residents are highly positive about FWISD magnet schools, but only half of district residents agree that FWISD's bilingual education programs prepare students to perform in mainstream classes.
- Fewer than half of district residents agree that FWISD elementary and secondary schools handle behavior problems effectively, and only half of residents agree that FWISD schools are safe and secure.
- A large majority of residents agree that FWISD parents are given opportunities to play an active role in public schools, and most residents with children in FWISD schools agree that they are made to feel welcome when they visit district schools.
- A substantial majority of residents say FWISD operates efficiently or very efficiently.
- Fewer than half of residents agree that FWISD does a good job of managing tax dollars to operate the district.

Public Awareness

Levels of public awareness of FWISD programs and services appear moderate.

- Fifty-five percent of the respondents said they know a little about FWISD's programs and services.
- Twenty-eight percent of the respondents said they know nothing at all, while 17 percent of the respondents stated they know a lot about FWISD's programs and services.

Knowledge of FWISD

Slightly more than one-third (35 percent) of respondents have school-age children living at home. Of those, more than three-quarters (79 percent) have a child or children enrolled in the district.

- Of those who have a child or children enrolled in an FWISD school, two-thirds (67 percent) have a child or children attending an elementary school.
- Thirty-six percent have a child or children attending an FWISD middle school, and 37 percent have a child or children attending high school.

Seventy-nine percent of district residents who are parents of school-age children have their child or children enrolled in FWISD schools exclusively. An additional 3 percent of this group have children enrolled in both FWISD and private schools.

Perceptions on Quality of Education

Overall ratings of FWISD are positive, with 9 percent of respondents rating the quality of education at FWISD as excellent and 49 percent rating it as good. Twenty-nine percent believe it is fair, and 13 percent feel it is poor.

- In ratings of FWISD quality over the past three years, 41 percent of respondents believed that the quality of education in FWISD has improved.
- Twelve percent of respondents said that the quality of education over the past three years has stayed the same, while 47 percent feel that it has gotten worse.

Respondents who have a child or children attending district schools were asked if they had children enrolled in elementary, middle, and/or high school. Among parents of children enrolled in FWISD schools, positive ratings of the quality of education are statistically identical.

- Seventy-four percent of the parents responding indicated that the quality of elementary education their children receive is excellent (32 percent) or good (42 percent).
- Among respondents who have a child or children in a district middle school, 72 percent said the quality of education their children receive is excellent (26 percent) or good (46 percent).
- Sixty-seven percent of the respondents with a child or children in FWISD high schools rated the quality of education received as excellent (24 percent) or good (43 percent).

Percent of respondents saying the quality of education their children receive is poor:

- Six percent of parents with a child or children in an FWISD elementary school or high school said the quality of education their children receive is poor.
- Seven percent of parents with a child or children in an FWISD middle school say the quality of education their children receive is poor.

In general, parents of FWISD school students are more likely to rate educational quality as excellent or good (67 percent) than the population as a whole (58 percent).

Perceptions of FWISD Employees

To assess the image of district employees, respondents were asked to rate various aspects of the knowledge and performance of school board members, the superintendent and administrators using a grading scale of A through F.

**FWISD School Board Members' Knowledge of Educational Needs
Total Responses**

Grading Scale	Percent
A	18%
B	40%
C	29%
D	9%
F	4%

- More than half of all respondents (58 percent) gave FWISD school board members a grade of A or B for their knowledge of educational needs.
- Twenty-nine percent of respondents gave FWISD school board members a grade of C for their knowledge of educational needs. The remaining 13 percent gave grades of D and F (9 and 4 percent, respectively)

**Performance of Current School Board
Total Responses**

Grading Scale	Percent
A	17%
B	39%
C	31%
D	8%
F	5%

- More than half of all respondents (56 percent) gave FWISD school board members a grade of A (17 percent) or B (39 percent) when rating the overall performance of the school board.
- Thirty-one percent gave a grade of C, and the remaining 13 percent graded the school board's performance as D or F (eight and five percent, respectively).

**Overall Performance of Superintendent
Total Responses**

Grading Scale	Percent
A	25%
B	37%
C	22%
D	10%
F	6%

- More than half of respondents (62 percent) gave the FWISD superintendent a grade of A or B for overall performance.
- Twenty-two percent of the respondents gave a grade of C. Sixteen percent provided poor ratings, with 10 percent giving a D and 6 percent giving an F.

**Performance of Top Administrators
Total Responses**

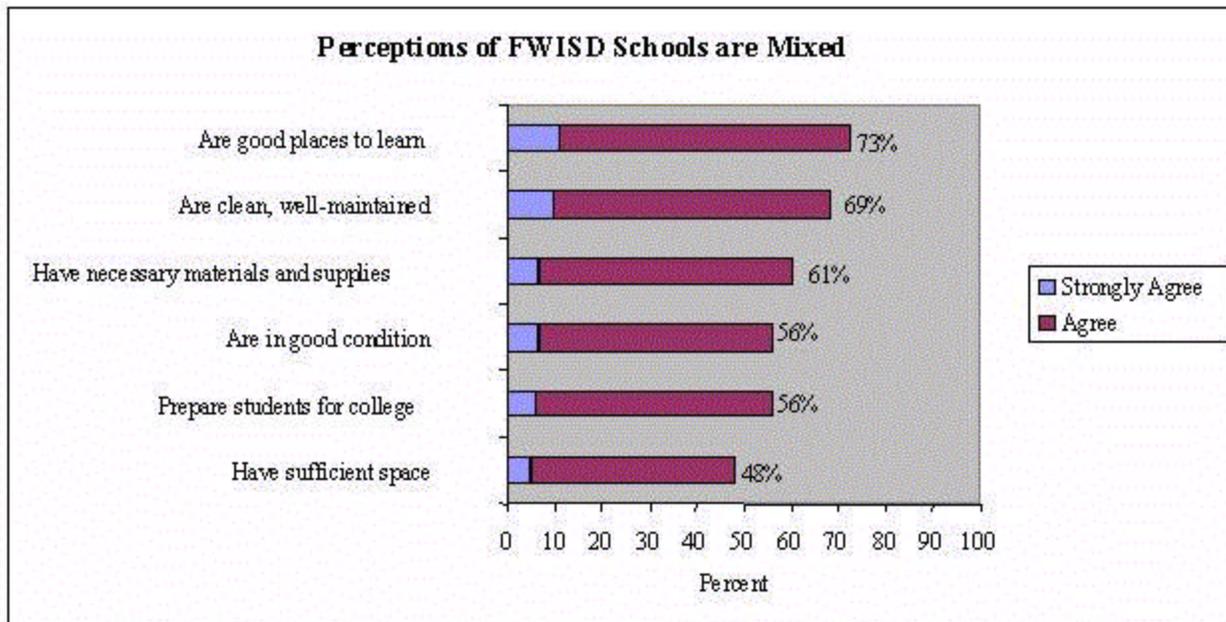
Grading Scale	Percent
A	17%
B	38%
C	32%
D	9%
F	4%

- When rating the overall performance of top administrators below the superintendent, 55 percent provided A and B grades.
- Thirty-two percent of respondents gave a C grade to the performance of top administrators below the superintendent.

- Thirteen percent of respondents gave poor grades to top administrators under the superintendent, with nine percent giving a D and four percent giving an F.

Perceptions of FWISD Schools

Ratings of FWISD facilities are mixed, with schools receiving the most credit for the learning environment they provide, and the least credit for providing sufficient space.



- More than seven in ten (73 percent) of respondents agree or strongly agree that FWISD schools are good places to learn. Conversely, 15 percent disagree or strongly disagree (12 percent and 3 percent, respectively).
- Nearly seven in ten (69 percent) of respondents agree or strongly agree that FWISD buildings are clean and well maintained; 14 percent disagree or strongly disagree (13 percent and 1 percent, respectively).
- Sixty-one percent of respondents agree or strongly agree that FWISD schools have the materials and supplies necessary for instruction. Conversely, 23 percent disagree or strongly disagree (20 percent and 3 percent, respectively).
- Fifty-six percent of respondents agree or strongly agree that FWISD schools are in good condition. Thirty percent disagree or strongly disagree (26 percent and 4 percent, respectively).
- Fifty-six percent of respondents agree or strongly agree that FWISD schools prepare students for college or the work force

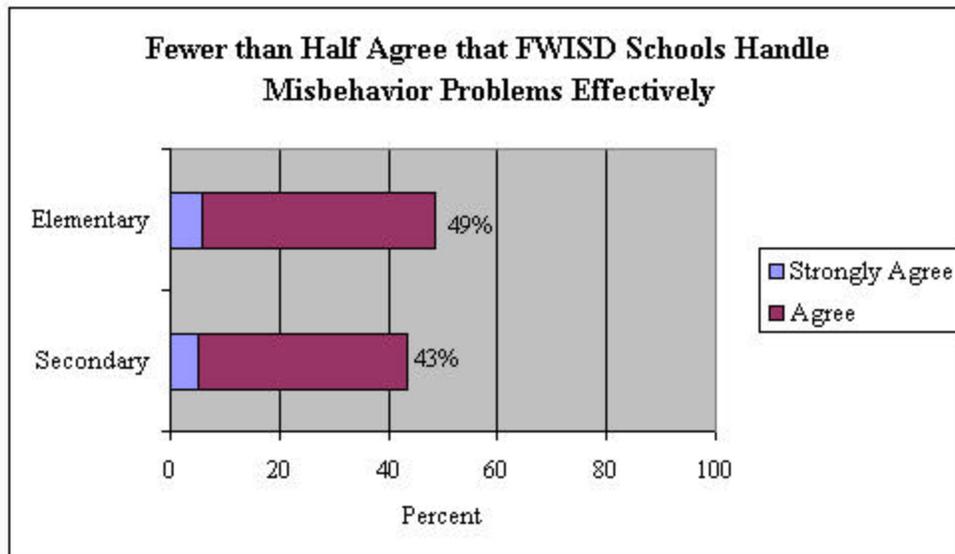
following graduation. Twenty-eight percent disagree or strongly disagree (24 percent and 4 percent, respectively).

- Forty-eight percent of respondents agree or strongly agree that FWISD schools have sufficient space and facilities to support instructional programs. Thirty-five percent disagree or strongly disagree (29 percent and 6 percent, respectively).

Most respondents (73 percent) agree or strongly agree that FWISD teachers care about students' needs.

- Seventy-three percent of respondents agree or strongly agreed that FWISD teachers care about students' needs.
- Fifteen percent of respondents disagree or strongly disagree (12 percent and 3 percent, respectively).

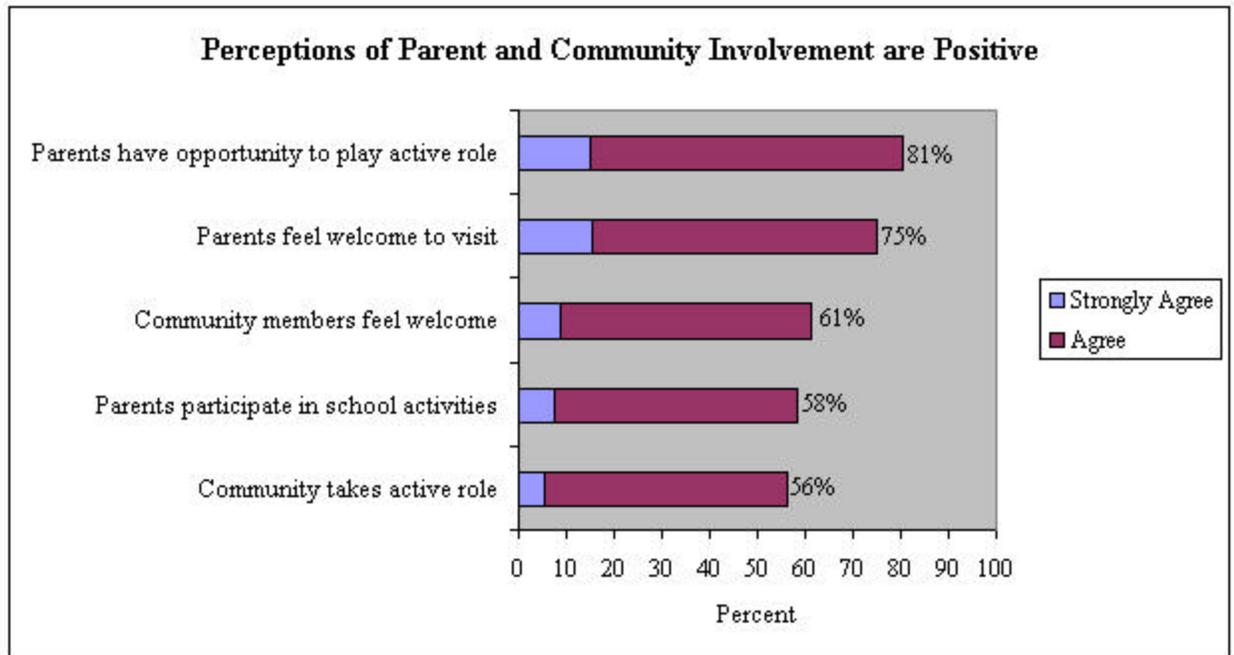
About half of respondents (52 percent) agree that schools in FWISD are safe and secure. Twenty-nine percent disagree or strongly disagree (23 percent and 6 percent, respectively).



- Forty-nine percent of respondents agree or strongly agree that FWISD elementary schools effectively handle problems of misbehavior. Twenty-seven percent disagree or strongly disagree.
- Forty-three percent of respondents agree or strongly agree that FWISD secondary schools effectively handle problems of misbehavior. Thirty percent disagree or strongly disagree.

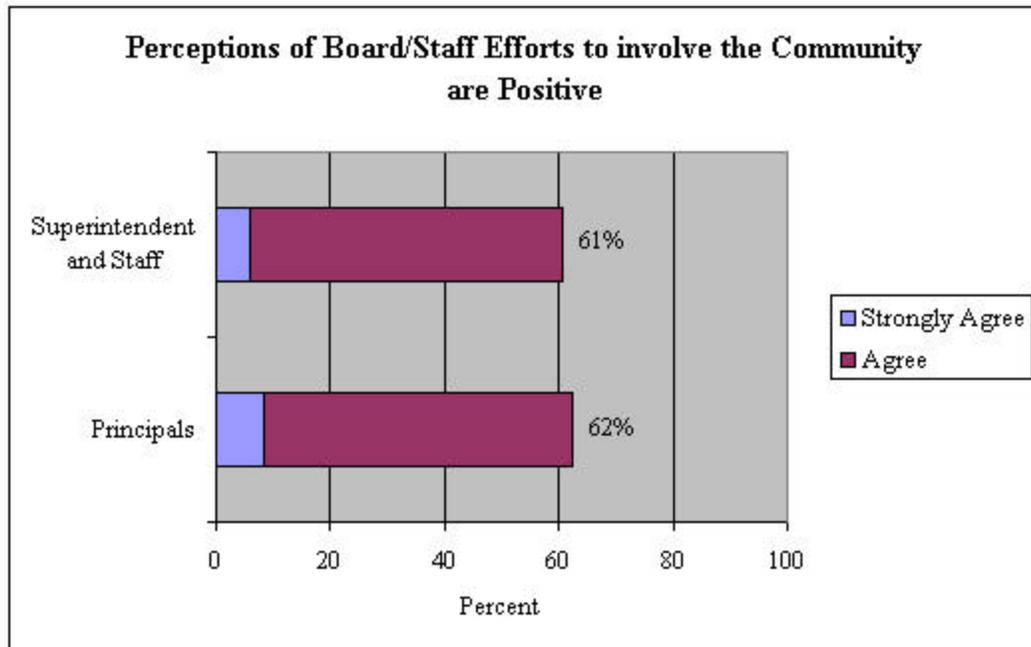
Perceptions of Parental Involvement and School Officials

FWISD residents are moderately to highly positive concerning the community's participation in the educational process and the district's efforts to engage them.



- Eighty-one percent of respondents agree or strongly agree that FWISD parents are given opportunities to play an active role in public schools. Eight percent disagreed or strongly disagreed (7 percent and 1 percent, respectively).
- Three-quarters of respondents agree or strongly agree that FWISD parents feel welcome when they visit a school. Ten percent disagree or strongly disagree (8 percent and 2 percent, respectively).
- Sixty-one percent of respondents agree or strongly agree that community members feel welcome to express their views when they attend FWISD school board meetings. Twelve percent disagree or strongly disagree (11 percent and 1 percent, respectively).
- Fifty-eight percent of respondents agree or strongly agree that FWISD parents participate in school activities and organizations. Twenty-two percent disagree or strongly disagree (19 percent and 3 percent, respectively).
- Fifty-six percent of respondents agree or strongly agree that community members take an active part in the education of children at FWISD. Twenty-three percent disagree or strongly disagree (21 percent and 2 percent, respectively).

Respondents also hold positive views about the efforts of FWISD employees and the school board to involve the community and parents in school activities.



- Sixty-one percent of respondents agree or strongly agree that the superintendent and staff work to involve the community in school activities. Sixteen percent disagree or strongly disagree (14 percent and 2 percent, respectively).
- Sixty-two percent of respondents agree or strongly agree that the school principals work to involve the community in campus activities. Sixteen percent disagree or strongly disagree (15 percent and 1 percent, respectively).

Sixty-three percent of respondents agree or strongly agree that the local business community does a lot to support FWISD programs.

District residents are moderately positive about FWISD public relations and communications.

- Six in ten (61 percent) agree the FWISD administration promotes good public relations between the district and the community.
- An almost equal percent (57 percent) agree that communications between the administration and the community are good.

Perceptions of FWISD's Specialized Services

Respondents were asked to consider specialized services such as bilingual education programs, magnet schools and computers and technology.

The majority of respondents (58 percent) agreed or strongly agreed that the district does a good job of meeting the educational needs of disadvantaged student populations. Eighteen percent disagree or strongly disagree (15 percent and 3 percent, respectively).

While FWISD residents have a high degree of confidence in magnet schools, they are less confident about the efficacy of bilingual education programs.

- District residents are highly positive about FWISD magnet schools, with three quarters (75 percent) rating them as excellent or good (23 percent and 52 percent, respectively). However, more than six in ten (63 percent) agree these programs should be expanded.
- Only half (52 percent) of district residents agree that FWISD's bilingual education programs prepare students to perform in mainstream classes. Forty-eight percent rate the bilingual programs as fair or poor (35 percent and 13 percent, respectively).

Appendix B

COMMUNITY SURVEY RESULTS

Perceptions continued/Survey Results

Perceptions of FWISD's Operations

FWISD residents provide somewhat inconsistent ratings of the district's financial management.

- More than seven in ten (72 percent) of residents who provided a rating said that FWISD operates very efficiently (seven percent) or efficiently (65 percent).
- Forty-three percent agree that FWISD does a good job of managing tax dollars to operate the district.

In the area of transportation, district residents provide moderately to highly positive ratings of the district's school bus transportation.

- Approximately three-quarters of district residents agree FWISD does a good job of providing transportation to and from school (77 percent) and for after-school activities (73 percent).
- Approximately two-thirds agree FWISD school bus transportation is safe for students (67 percent); that buses are well maintained and in good condition (68 percent); and that drivers are competent and well trained (69 percent).
- Approximately two-thirds of district residents agree information on routes and schedules is easy to find (69 percent) and that they know the person to contact with questions (65 percent).

Demographic Characteristics

Anglos constitute a majority of the FWISD survey respondents (54 percent); African Americans made up 23 percent; and Hispanics made up 21 percent.

Racial/Ethnic Composition of the Survey Respondents

Racial/Ethnic Group	Percent
Anglo	54%
African American	23%
Hispanic	21%

Asian	1%
Other	1%

- More than half (62 percent) of respondents reported an income of \$25,000 or more. Thirty-eight percent indicated that their total household income is less than \$25,000.
- About seven percent of all households in FWISD said their total household income is less than \$5,000, and 26 percent reported an income of \$50,000 or more.

Total Household Income

Income	Percent
Less than \$5,000	7%
\$5,000 to \$14,999	10%
\$15,000 to \$24,999	21%
\$25,000 to \$34,999	19%
\$35,000 to \$49,999	17%
\$50,000 or more	26%

- Forty-eight percent of all respondents said they have a high school education or less education.
- Slightly more than half of all respondents said they have one to three years of college (24 percent) or a college degree or higher (28 percent).
- Sixty-four percent of respondents said their age falls between 25 and 64 years old. Twenty-eight percent are 65 or older.

Age Distribution

Age Interval	Percent
18 to 24	8%
25 to 34	18%
35 to 49	24%
50 to 64	22%
65 or older	28%

Other demographic characteristics of the 2000 FWISD Community Survey respondents include:

- There are slightly fewer than three people in the average district household;
- Fifty-one percent of respondents said they were either employed full-time (44 percent) or part time (seven percent), while 30 percent indicated they were either retired or disabled;
- Fifty-six percent of respondents said they were married, and of those spouses, 55 percent are employed either full-time (48 percent) or part time (seven percent) while 25 percent are retired or disabled; and
- More than seven out of ten respondents (71 percent) report having lived in FWISD for 11 or more years. Nearly the same percent (67 percent) own their current residence.

Community Survey Results

14. In your opinion, would you rate the quality of public education at Fort Worth ISD schools as...

Response	Percent
Excellent	9.0%
Good	48.9%
Fair	29.4%
Poor	12.7%
Total	100.0%

15. Over the past three years, would you say the quality of public education in Fort Worth ISD has...

Response	Percent
Improved	40.5%
Stayed the Same	12.1%
Gotten Worse	47.3%
Total	100.0%

Students are often given the grades of **A**, **B**, **C**, **D** and **F** to denote their performance in the classroom. Using these same grades, for the next set of

questions, rate the performance of the following individuals or groups associated with the Fort Worth ISD.

16. In general, what grade would you give the Fort Worth ISD school board members' knowledge of the educational needs of students within Fort Worth ISD?

Response	Percent
Grade A	17.8%
Grade B	40.5%
Grade C	28.8%
Grade D	8.7%
Grade F	4.1%
Total	100.0%

17. Overall, would you rate the performance of the current board as...

Response	Percent
Grade A	16.7%
Grade B	39.4%
Grade C	30.8%
Grade D	8.5%
Grade F	4.6%
Total	100.0%

18. How would you rate the overall performance of the superintendent?
Would you give him a...

Response	Percent
Grade A	25.4%
Grade B	37.0%
Grade C	22.4%
Grade D	9.6%
Grade F	5.6%
Total	100.0%

19. What about the overall performance of top administrators below the superintendent? Would you give them a...

Response	Percent
Grade A	17.1%
Grade B	38.5%
Grade C	31.7%
Grade D	8.8%
Grade F	3.9%
Total	100.0%

20. Do you have any school age children living in your home?

Response	Percent
Yes	35.6%
No	64.4%
Total	100.0%

21. Are they enrolled in Fort Worth ISD schools or private schools?

Response	Percent
Fort Worth ISD	79.2%
Private School	14.7%
Both	3.0%
Other	3.0%
Total	100.0%

IF FORT WORTH ISD OR BOTH, ASK:

B. Do you have children enrolled in a Fort Worth ISD elementary school?

Response	Percent
Yes	67.4%
No	32.6%

Total	100.0%
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C. Do you have children enrolled in a Fort Worth ISD middle school?

Response	Percent
Yes	35.8%
No	64.2%
Total	100.0%

D. Do you have children enrolled in a Fort Worth ISD high school?

Response	Percent
Yes	36.8%
No	63.2%
Total	100.0%

FOR EACH YES ABOVE, ASK:

E. How would you rate the quality of education your child receives through a Fort Worth ISD elementary school?
Would you say it is...

Response	Percent
Excellent	32.3%
Good	41.7%
Fair	19.7%
Poor	6.3%
Total	100.0%

F. How would you rate the quality of education your child receives through a Fort Worth ISD middle School? Would you say it is...

Response	Percent
Excellent	26.5%

Good	45.6%
Fair	20.6%
Poor	7.4%
Total	100.0%

G. How would you rate the quality of education your child receives through a Fort Worth ISD high School? Would you say it is...

Response	Percent
Excellent	24.3%
Good	42.9%
Fair	27.1%
Poor	5.7%
Total	100.0%

22. How much do you know about the programs and services provided by Fort Worth ISD?

Response	Percent
A Lot	17.3%
A Little	54.8%
Nothing	27.9%
Total	100.0%

Based on what you know or have heard, do you strongly agree, agree, have no opinion, disagree or strongly disagree for each of the following statements about Fort Worth ISD:

23. Schools in Fort Worth ISD are safe and secure.

Response	Percent
Strongly Agree	6.1%
Agree	45.8%
No Opinion	19.5%

Disagree	23.1%
Strongly Disagree	5.6%
Total	100.0%

24. Fort Worth ISD elementary schools effectively handle problems of misbehavior.

Response	Percent
Strongly Agree	6.0%
Agree	42.7%
No Opinion	24.8%
Disagree	22.5%
Strongly Disagree	4.0%
Total	100.0%

25. Fort Worth ISD secondary schools effectively handle problems of misbehavior.

Response	Percent
Strongly Agree	5.0%
Agree	38.4%
No Opinion	26.3%
Disagree	24.3%
Strongly Disagree	6.1%
Total	100.0%

26. Schools in Fort Worth ISD have sufficient space and facilities to support the instructional programs.

Response	Percent
Strongly Agree	5.3%
Agree	42.7%
No Opinion	17.1%
Disagree	28.6%

Strongly Disagree	6.2%
Total	100.0%

27. Fort Worth ISD buildings are in good condition.

Response	Percent
Strongly Agree	6.6%
Agree	49.8%
No Opinion	13.5%
Disagree	26.1%
Strongly Disagree	4.0%
Total	100.0%

28. Fort Worth ISD buildings are clean and well maintained.

Response	Percent
Strongly Agree	9.6%
Agree	59.1%
No Opinion	17.4%
Disagree	12.7%
Strongly Disagree	1.2%
Total	100.0%

29. Schools in Fort Worth ISD are good places to learn.

Response	Percent
Strongly Agree	11.2%
Agree	61.4%
No Opinion	12.6%
Disagree	11.9%
Strongly Disagree	2.9%
Total	100.0%

30. Schools in this district have the materials and supplies necessary for instruction in basic skills programs.

Response	Percent
Strongly Agree	6.6%
Agree	54.1%
No Opinion	16.4%
Disagree	19.9%
Strongly Disagree	3.0%
Total	100.0%

31. Fort Worth ISD teachers care about students' needs.

Response	Percent
Strongly Agree	13.1%
Agree	59.7%
No Opinion	12.9%
Disagree	11.6%
Strongly Disagree	2.7%
Total	100.0%

32. Fort Worth ISD parents are given opportunities to play an active role in public schools.

Response	Percent
Strongly Agree	15.0%
Agree	65.6%
No Opinion	11.1%
Disagree	7.0%
Strongly Disagree	1.4%
Total	100.0%

33. Fort Worth ISD parents feel welcome when they visit a school.

Response	Percent
Strongly Agree	15.3%
Agree	59.6%
No Opinion	14.8%
Disagree	8.2%
Strongly Disagree	2.1%
Total	100.0%

34. Fort Worth ISD parents participate in school activities and organizations.

Response	Percent
Strongly Agree	7.5%
Agree	50.8%
No Opinion	19.1%
Disagree	19.3%
Strongly Disagree	3.3%
Total	100.0%

Appendix B

COMMUNITY SURVEY RESULTS

Survey Results continued

35. Community members take an active part in the education of children at Fort Worth ISD.

Response	Percent
Strongly Agree	5.4%
Agree	50.7%
No Opinion	20.5%
Disagree	20.9%
Strongly Disagree	2.5%
Total	100.0%

36. Community members feel welcome when they attend Fort Worth ISD school board meetings to express their views.

Response	Percent
Strongly Agree	8.9%
Agree	52.3%
No Opinion	27.0%
Disagree	10.9%
Strongly Disagree	0.9%
Total	100.0%

37. The superintendent and staff work to involve the community in school activities.

Response	Percent
Strongly Agree	5.9%
Agree	54.8%
No Opinion	23.1%
Disagree	14.2%

Strongly Disagree	2.0%
Total	100.0%

38. The school principals work to involve the community in school activities.

Response	Percent
Strongly Agree	8.3%
Agree	53.9%
No Opinion	21.5%
Disagree	15.0%
Strongly Disagree	1.3%
Total	100.0%

39. Fort Worth ISD administration does a lot to promote good public relations between the district and the community.

Response	Percent
Strongly Agree	5.8%
Agree	55.7%
No Opinion	18.2%
Disagree	17.7%
Strongly Disagree	2.7%
Total	100.0%

40. Communications are good between Fort Worth ISD district administration and the community.

Response	Percent
Strongly Agree	5.4%
Agree	51.6%
No Opinion	18.5%
Disagree	22.3%
Strongly Disagree	2.2%

Total	100.0%
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41. The community is proud of the public school education in Fort Worth ISD.

Response	Percent
Strongly Agree	4.6%
Agree	56.4%
No Opinion	17.1%
Disagree	19.3%
Strongly Disagree	2.7%
Total	100.0%

42. Fort Worth ISD graduates are prepared to go on to college or directly into the work force when they graduate.

Response	Percent
Strongly Agree	6.1%
Agree	50.3%
No Opinion	15.9%
Disagree	23.7%
Strongly Disagree	3.9%
Total	100.0%

43. The local business community in Fort Worth county does a lot to support Fort Worth ISD programs.

Response	Percent
Strongly Agree	6.9%
Agree	56.3%
No Opinion	20.6%
Disagree	15.2%
Strongly Disagree	1.1%
Total	100.0%

44. Fort Worth ISD does a good job of meeting the educational needs of the disadvantaged student population.

Response	Percent
Strongly Agree	6.8%
Agree	51.6%
No Opinion	23.6%
Disagree	14.8%
Strongly Disagree	3.3%
Total	100.0%

45. How well do bilingual education programs prepare students to perform at school in Fort Worth ISD?

Response	Percent
Excellent	10.8%
Good	40.7%
Fair	35.4%
Poor	13.1%
Total	100.0%

46. How would you rate Fort Worth ISD's magnet school programs such as fine arts, health professions and languages?

Response	Percent
Excellent	22.6%
Good	52.0%
Fair	20.3%
Poor	5.1%
Total	100.0%

47. Fort Worth ISD is effectively preparing students in the areas of computers and technology.

Response	Percent
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Strongly Agree	10.4%
Agree	52.3%
No Opinion	21.6%
Disagree	13.0%
Strongly Disagree	2.6%
Total	100.0%

48. Fort Worth ISD does a good job of managing the tax dollars used to operate the district.

Response	Percent
Strongly Agree	3.6%
Agree	39.6%
No Opinion	33.7%
Disagree	16.9%
Strongly Disagree	6.1%
Total	100.0%

49. Overall, based on everything you have seen, heard or read about the district, would you say Fort Worth ISD is operating...

Response	Percent
Very Efficiently	6.8%
Somewhat Efficiently	65.3%
Somewhat Inefficiently	18.1%
Very Inefficiently	9.8%
Total	100.0%

50. School bus transportation is safe for students.

Response	Percent
Strongly Agree	3.9%
Agree	62.7%

No Opinion	5.9%
Disagree	21.6%
Strongly Disagree	5.9%
Total	100.0%

51. Buses arrive and leave on time.

Response	Percent
Strongly Agree	7.5%
Agree	47.2%
No Opinion	5.7%
Disagree	30.2%
Strongly Disagree	9.4%
Total	100.0%

52. School buses are well maintained and in good condition.

Response	Percent
Strongly Agree	15.1%
Agree	52.8%
No Opinion	7.5%
Disagree	22.6%
Strongly Disagree	1.9%
Total	100.0%

53. School bus drivers are competent and well trained.

Response	Percent
Strongly Agree	11.5%
Agree	57.7%
No Opinion	11.5%
Disagree	17.3%
Strongly Disagree	1.9%

Total	100.0%
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54. The district deals with student discipline on school buses quickly and effectively.

Response	Percent
Strongly Agree	8.0%
Agree	68.0%
No Opinion	8.0%
Disagree	12.0%
Strongly Disagree	4.0%
Total	100.0%

55. Current information on bus routes and schedules is easy to find.

Response	Percent
Strongly Agree	11.8%
Agree	56.9%
No Opinion	5.9%
Disagree	23.5%
Strongly Disagree	2.0%
Total	100.0%

56. When I have a question about school bus transportation I know who to contact.

Response	Percent
Strongly Agree	11.5%
Agree	53.8%
No Opinion	3.8%
Disagree	28.8%
Strongly Disagree	1.9%
Total	100.0%

57. The district does a good job providing student transportation for home to school and return.

Response	Percent
Strongly Agree	13.2%
Agree	64.2%
No Opinion	3.8%
Disagree	17.0%
Strongly Disagree	1.9%
Total	100.0%

58. The district has an effective procedure to arrange buses for field trips and special events.

Response	Percent
Strongly Agree	21.7%
Agree	63.6%
No Opinion	7.6%
Disagree	6.0%
Strongly Disagree	1.1%
Total	100.0%

59. The district does a good job providing student transportation for school activities.

Response	Percent
Strongly Agree	15.2%
Agree	57.9%
No Opinion	15.2%
Disagree	10.1%
Strongly Disagree	1.7%
Total	100.0%

60. How long have you lived in the Fort Worth area?

Response	Percent
One to Two Years	7.5%
Three to Five Years	10.0%
Six to Ten Years	11.2%
Eleven or More Years	71.2%
Total	100.0%

61. Counting yourself, how many people live in your household?

Response	Percent
One	21.6%
Two	30.7%
Three	15.9%
Four	16.9%
Five	9.4%
Six	3.2%
Seven	0.9%
Eight	0.9%
Ten	0.3%
Thirteen	0.2%
Total	100.0%

62. What is the highest level of formal education you have completed?

Response	Percent
Less Than High School	17.0%
High School Graduate	31.1%
One to Three Years College	24.3%
College Degree or Higher	27.7%
Total	100.0%

63. Marital status: Are you...

Response	Percent
Married	55.8%
Widowed	12.6%
Separated	3.4%
Divorced	11.1%
Never Married	16.0%
Living Together	1.1%
Total	100.0%

64. Employment status: Are you currently...

Response	Percent
Employed Full-Time	44.0%
Employed Part-Time	6.6%
Unemployed	4.0%
Retired or Disabled	29.7%
Going to School	1.5%
A Homemaker	10.9%
Something Else	3.2%
Total	100.0%

65. If married: Is your spouse currently...

Response	Percent
Employed Full-Time	47.9%
Employed Part-Time	7.2%
Unemployed	3.0%
Retired or Disabled	25.2%
Going to School	1.4%
A Homemaker	12.2%
Something Else	3.0%
Total	100.0%

66. Do you own or rent?

Response	Percent
Own	67.2%
Rent	28.5%
Live Rent-Free	4.3%
Total	100.0%

67. What is your home zip code? _____

68. Age: In what group does your age fall?

Response	Percent
18 to 24 Years Old	8.0%
25 to 34 Years Old	17.9%
35 to 49 Years Old	24.2%
50 to 64 Years Old	22.3%
65 or Older	27.6%
Total	100.0%

69. Race/Ethnicity: Do you consider yourself...

Response	Percent
Anglo	53.7%
Black	22.7%
Hispanic	21.3%
Asian	0.8%
Something Else	1.4%
Total	100.0%

70. Income: What was your total annual household income for 1999 from all sources before taxes?

Response	Percent
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Less than \$5,000	6.5%
\$5,000 to \$14,999	9.9%
\$15,000 to \$ 24,999	21.5%
\$25,000 to \$34,999	19.0%
\$35,000 to \$49,999	17.2%
\$50,000 or More	25.9%
Total	100.0%

71. Gender of respondent:

Response	Percent
Male	46.5%
Female	53.5%
Total	100.0%

72. Language of interview:

Response	Percent
English	86.6%
Spanish	13.4%
Total	100.0%

Thank you very much for your cooperation.

Appendix C

DISTRICT ADMINISTRATOR AND SUPPORT STAFF SURVEY

A. Demographic Data

STATEMENT		CATEGORY		
		No Response	Male	Female
1.	Gender (Optional)		25.3%	74.7%

STATEMENT		CATEGORY					
		No Response	Anglo	African-American	Hispanic	Asian	Other
2.	Ethnicity (Optional)		61%	24.2%	13%	0.4%	1.3%

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 FWISD ?		26.9%	22.6%	17.5%	7.7%	25.2%

STATEMENT		CATEGORY			
		No Response	Administrator	Clerical Staffer	Support Staffer
4.	Are you a(n):		41.2%	23.6%	35.2%

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 FWISD ?		35.6%	23.7%	19.5%	8.9%	12.3%

Appendix C

DISTRICT ADMINISTRATOR AND SUPPORT STAFF SURVEY

B. Survey Questions

District Organization and Management

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The school board allows sufficient time for public input at meetings.	11.3%	43.9%	28.9%	13.8%	2.1%
2.	School board members listen to the opinions and desires of others.	12.9%	50.4%	20.4%	10.4%	5.8%
3.	The superintendent is a respected and effective instructional leader.	16.9%	37.2%	19.8%	16.9%	9.1%
4.	The superintendent is a respected and effective business manager.	16.2%	33.6%	27.8%	14.9%	7.5%
5.	Central administration is efficient.	7.6%	34%	16.4%	32.4%	9.7%
6.	Central administration supports the educational process.	13.1%	51.5%	15.6%	15.6%	4.2%
7.	The morale of central administration staff is good.	5%	28%	34.3%	23.8%	8.8%

B. Educational Service Delivery and Performance Measurement

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
8.	Education is the main priority in our school district.	30.4%	52.1%	5.8%	10.4%	1.3%

9.	Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	7.1%	37.9%	30.8%	21.7%	2.5%
10.	The needs of the college-bound student are being met.	10%	42.1%	32.1%	13.8%	2.1%
11.	The needs of the work-bound student are being met.	5.1%	35%	36.3%	20.3%	3.4%
12.	The district has effective educational programs for the following:					
	a. Reading	20.4%	50.8%	18.3%	9.2%	1.3%
	b. Writing	13.9%	45.8%	24.4%	15.1%	.8%
	c. Mathematics	13.4%	52.3%	20.5%	13%	.8%
	d. Science	6.8%	46%	31.6%	13.5%	2.1%
	e. English or Language Arts	8.1%	55.1%	28.8%	7.2%	.8%
	f. Computer Instruction	9.4%	42.6%	27.7%	16.6%	3.8%
	g. Social Studies (history or geography)	4.6%	49.6%	31.9%	10.5%	3.4%
	h. Fine Arts	5.1%	39.1%	29.4%	18.3%	8.1%
	i. Physical Education	8.5%	53%.	28.8%	8.5%	1.3%
	j. Business Education	8.4%	39.2%	41.4%	9.7%	1.3%
	k. Vocational (Career and Technology) Education	9.3%	38.4%	35.4%	13.9%	3%
	l. Foreign Language	6%	41.5%	38%	11.5%	3%
13.	The district has effective special programs for the following:					
	a. Library Service	13.2%	43.6%	37.2%	5.1%	.9%
	b. Honors/Gifted and Talented Education	15.6%	47.7%	26.6%	8.4%	1.7%

	c. Special Education	14.5	44%	24.8%	12.8%	3.8%
	d. Head Start and Even Start programs	11.5%	31.2%	52.6%	3.8%	.9%
	e. Dyslexia program	4.3%	18.3%	61.3%	10.6%	5.5%
	f. Student mentoring program	5%	34.5%	47.5%	10.5%	2.5%
	g. Advanced placement program	8%	47.5%	37.4%	6.7%	.4%
	h. Literacy program	9.3%	36.7%	45.1%	6.3%	2.5%
	i. Programs for students at risk of dropping out of school	10.5%	31.2%	35%	16%	7.2%
	j. Summer school programs	10.5%	54.2%	27.3%	6.7%	1.3%
	k. Alternative education programs	11%	47.3%	27.8%	10.5%	3.4%
	l. English as a Second Language program	12.2%	47.1%	29.8%	7.1%	3.8%
	m. Career counseling program	4.2%	28.4%	45.3%	19.5%	2.5%
	n. College counseling program	5.5%	27.7%	45.1%	18.7%	3%
	o. Counseling the parents of students	6.8%	24.2%	39.4%	24.2%	5.5%
	p. Dropout prevention program	5.6%	24.8%	41.5%	21.4%	6.8%
14.	Parents are immediately notified if a child is absent from school.	5.5%	28%	34.3%	23.3%	8.9%
15.	Teacher turnover is low.	2.9%	10.5%	24.8%	42.9%	18.9%
16.	Highly qualified teachers fill job openings.	2.5%	21.9%	28.3%	36.7%	10.5%
17.	Teacher openings are filled quickly.	1.7%	23.9%	24.8%	38.2%	11.3%
18.	Teachers are rewarded	2.5%	15.1%	31.4%	34.7%	16.3%

	for superior performance.					
19.	Teachers are counseled about less than satisfactory performance.	5%	33.5%	42.7%	15.9%	2.9%
20.	All schools have equal access to educational materials such as computers, television monitors, science labs and art classes.	5.4%	27.1%	25.8%	25%	16.7%
21.	The student-teacher ratio is reasonable.	3.8%	34.5%	22.7%	25.6%	13.4%
22.	Students have access, when needed, to a school nurse.	16.7%	48.8%	19.2%	12.1%	3.3%
23.	Classrooms are seldom left unattended.	7.5%	43.5%	35.6%	10%	3.3%

C. Personnel Management

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
24.	District salaries are competitive with similar positions in the job market.	7.1%	27.1%	12.5%	34.6%	18.8%
25.	The district has a good and timely program for orienting new employees.	5.8%	39.3%	21.9%	24%	9.1%
26.	Temporary workers are rarely used.	2.1%	10.8%	23.8%	43.3%	20%
27.	The district successfully projects future staffing needs.	2.9%	22.4%	29.9%	30.3%	14.5%
28.	The district has an effective employee recruitment program.	3.3%	27.4%	34%	23.7%	11.6%

29.	The district operates an effective staff development program.	4.1%	33.2%	22.8%	29.9%	10%
30.	District employees receive annual personnel evaluations.	14.9%	62.7%	13.7%	6.2%	2.5%
31.	The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	3.4%	19.4%	15.2%	38%	24.1%
32.	Employees who perform below the standard of expectation are counseled appropriately and timely.	1.7%	26.3%	30%	29.6%	12.5%
33.	The district has a fair and timely grievance process.	3.8%	36.9%	36.9%	15.3%	7.2%
34.	The district's health insurance package meets my needs.	2.9%	25.6%	13%	26.5%	31.9%

D. Community Involvement

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
35.	The district regularly communicates with parents.	6.3%	49%	24.3%	18%	2.5%
36.	The local television and radio stations regularly report school news and menus.	7.6%	46.2%	18.1%	23.1%	5%
37.	Schools have plenty of volunteers to help student and school programs.	3.3%	25.5%	28%	31%	12.1%

38.	District facilities are open for community use.	6.3%	41%	35.1%	14.2%	3.3%
39.	Parents, citizens, students, faculty, staff and the board provide input into facility planning.	7.6%	30.8%	35%	19%	7.6%
40.	The architect and construction managers are selected objectively and impersonally.	5.5%	17.3%	59.9%	10.1%	7.2%
41.	Schools are clean.	10.1%	55.5%	12.6%	14.7%	7.1%
42.	Buildings are properly maintained in a timely manner.	9.2%	43.5%	11.7%	24.7%	10.9%
43.	Repairs are made in a timely manner.	6.4%	34.3%	13.6%	29.2%	16.5%
44.	Emergency maintenance is handled promptly.	15.1%	46.6%	18.5%	12.6%	7.1%

E. Financial Management

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
45.	Site-based budgeting is used effectively to extend the involvement of principals and teachers.	5.9%	30.1%	45.6%	14.2%	4.2%
46.	Campus administrators are well trained in fiscal management techniques.	3.4%	23.5%	43.3%	23.9%	5.9%
47.	The district's financial reports are easy to understand and read.	2.9%	23.9%	47.5%	18.5%	7.1%
48.	Financial reports are made available to	4.6%	25.6%	60.9%	5.9%	2.9%

	community members when asked.					
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F. Purchasing and Warehousing

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
49.	Purchasing gets me what I need when I need it.	6.3%	43.3%	20.6%	23.1%	6.7%
50.	Purchasing acquires the highest quality materials and equipment at the lowest cost.	2.6%	37.2%	28.2%	24.8%	7.3%
51.	Purchasing processes are not cumbersome for the requestor.	3.8%	38.3%	28.1%	23.8%	6%
52.	The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	8%	50%	24.8%	13%	4.2%
53.	Students are issued textbooks in a timely manner.	5%	38.8%	34.2%	18.3%	3.8%
54.	Textbooks are in good shape.	4.2%	47%	36.9%	8.5%	3.4%
55.	The school library meets students' needs for books and other resources for students.	6.8%	49.8%	34.2%	8%	1.3%

G. Food Services

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
56.	Gangs are not a problem in this district.	2.1%	11.3%	21.8%	49.8%	15.1%
57.	Drugs are not a problem in this district.	2.5%	10%	23.8%	46.9%	16.7%

58.	Vandalism is not a problem in this district.	1.3%	8.3%	21.7%	48.8%	20%
59.	Security personnel have a good working relationship with principals and teachers.	13.4%	48.1%	28.9%	6.3%	3.3%
60.	Security personnel are respected and liked by the students they serve.	10%	43.9%	36.4%	7.5%	2.1%
61.	A good working arrangement exists between the local law enforcement and the district.	17.2%	58.6%	21.3%	1.3%	1.7%
62.	Students receive fair and equitable discipline for misconduct.	9.6%	33.9%	26.8%	18.4%	11.3%

H. Transportation

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
63.	Students regularly use computers.	10.2%	44.5%	21.6%	21.2%	2.5%
64.	Students have regular access to computer equipment and software in the classroom.	8.5%	33.9%	26.3%	27.1%	4.2%
65.	Teachers know how to use computers in the classroom.	5.5%	36.7%	27.4%	26.2%	4.2%
66.	Computers are new enough to be useful for student instruction.	6.4%	42.6%	26.8%	16.6%	7.7%
67.	The district meets students' needs in computer fundamentals.	5.9%	42.4%	27.5%	18.6%	5.5%
68.	The district meets students' needs in	4.2%	24.9%	38.8%	23.2%	8.9%

	advanced computer skills.					
69.	Teachers and students have easy access to the Internet.	5.5%	28.5	28.9%	26.4%	10.6%

Appendix C

DISTRICT ADMINISTRATOR AND SUPPORT STAFF SURVEY

C. Narrative Comments - Part 1

The narrative comments below reflect the perceptions and opinions of administrative and support staff survey respondents.

- FWISD Adult "English as a Second Language" classes are managed poorly. There is more concern about state records and completed numbers of students (meeting quotas, etc.) than educating the students. The whole Adult ESL program needs to be seriously looked at carefully. Money is wasted. Priority for student education is not the first concern. Money is misused. The structure of the program needs to be effectively organized to maximize student learning. Not enough materials and supplies for teachers and students. The ratio per dollar and student achievement is not cost effective. There is a great disparity between the two.
- Too many race issues affecting many schools, as well as downtown officers who are too political. The employees that work above the required hours are never acknowledged. All students do not have equal access; only the rich schools that. This is so out of control nationwide. What can you do to help families, especially single income earners, who cover their children and take home less pay because of high cost of premiums. I love this district, but there are areas that need help and the superintendent needs to be honest and quit running off the best administrators and teachers. Thanks and good luck! Concerned taxpayer and employee who proudly works for FWISD!
- The district's educational performance is commendable. Trends measuring student achievement, for all student groups, are on the rise. The focus of the district is on academic improvement.
- The educational performance of the FWISD would be greatly improved if all administrative personnel were required to spend at least one week in a school each year. As a clerical staff member in a high school, I am amazed at how often surveys, reports and all types of questionnaires are sent to the school to be distributed and completed then returned with one or two days notice. It puts a real hardship on all school employees, the principal, teachers and students. Valuable instruction time is used in these instances. Administration Building personnel seem to have forgotten what it is like to be in a school if they ever were.
- Inequalities exist throughout the district. There is bond money available to upgrade technology in the district. They are currently

working on purchasing and distributing computers throughout the district.

- There is a real need for more community involvement. Also the problem of those employed who do not live in the area they work in; this causes a conflict. There is a need for minority teachers such as Vietnamese, Mexican and Blacks. Many of the employees have to work two jobs. There's a need for salary based upon the economy. The insurance benefits do not meet the need.
- FWISD has been fortunate to have strong superintendent leadership over the last 5 years. The current superintendent cares about children and instruction. He sets the standard for high achievement for all students. We also have a strong school board who supports administrative decisions and listens to the community. Our focus has been on the basics (reading and math) and is now bringing back the fine arts. I am proud to work in FWISD.
- If you compare FWISD's instructional progress with other Texas districts you'll see a higher rate. It seems like other parts of the nation respect FWISD's progress more than the Fort Worth citizens do.
- Slow learners get away with murder because the system is set up that way. Teachers, support staff and assistant principals are verbally abused by students and they remain in school; it's a numbers game for money. Too many young teachers without certifications are trying to teach and there is no class control.
- Fort Worth ISD, in my opinion, is one of the best school districts in Texas, but there are too many kids (students) who are allowed to roam my campus unchecked. Some I counsel everyday and report to security personnel. Those individuals, when allowed to cut classes on a daily basis, should be sent to an alternative school.
- I have been an employee of FWISD for 30 years under many different superintendents and the years under the current leadership have been the most disruptive to the overall functioning of the system. Whenever something doesn't work correctly or his relationship with our administration sours, we undergo a reorganization. In the area in which I worked from 1991 to summer of 1999, I had six assistant and associate superintendents to whom I reported. One I only reported to for six months. Morale is very low and there is little trust among employers, and the turnover rate is high. Yes, our test scores have risen, but there is little science, art, music and social studies being taught in the elementary schools. The district and the superintendent remind me of the story, "The Emperor Who Wore No Clothes." I must add, however, that there are many dedicated and hardworking employees who try to provide good schools for all the students.

- It was difficult answering so negatively, but it is truthful. Definitely too heavy of a work load for clerks (especially middle school data clerks) and many times with no lunch breaks, or no breaks period. More and more work is added and no more higher wage added. Middle school data clerks are paid less than high school data clerks and they have even heavier workloads than high school. Very frustrating!!!!
- Major hiring concerns in the Personnel department. Please check into the hiring process for supervisors, coordinators, mid-level positions. Positions are posted for 10 days. If the person (department head) does not like the applicants or whatever they advertise again or extend the deadline. The process is too long! (Example: an advertisement was posted August 17, 2000 through August 31, 2000; then the same job was extended to September 17, 2000. The job closed. Today's date is October 6, 2000 - and applicants have not been contacted for an interview to date. That has been 35 working days since the job closed!!!! This process is too long! Also, a major concern is existing employees meeting the qualifications and are not promoted to a higher paying job. In my opinion, they should promote from within, because of knowing the computer system, the schools and locations. The accounting department places a temporary person in a position from an agency such as Account Temps, lets them work in a position to learn the job, then advertises and hires the temporary person that was placed in the job. Also, in Personnel, they let retired employees work in their old position instead of filling the job with a new person who would like to work for FWISD with a good salary. A major example: About four years ago, the Personnel Department went through a major re-organization. Positions were advertised listing responsibilities and educational requirements, etc. The assistant superintendent of Personnel was in charge, with an associate superintendent over Personnel. All applicants who qualified and also ones that did not meet the basic requirements were interviewed. Three coordinator positions requiring a BA degree were advertised. Plus other qualifications, etc. The assistant superintendent chose a committee to interview applicants that were personal friends. They hired three coordinators, and two of them had no college hours; none!! One person had some college hours from a junior college!!! How Can This Be Stopped?????
- There is no training for the administrative staff. Software and hardware updates are delivered in seemingly random fashion, without adequate planning or advance notice of a change. Changes are frequently put into effect without preparing the end user for the changes. Email for teachers is almost nonexistent. The Superintendent and Board members are not reachable via email.

When the foundation technology is poorly managed and delivered, then it follows that the educational performance suffers greatly.

- In my years as an employee of FWISD, it seems the quality of education has been lowered. More emphasis seems to be on the politics and not on the student's needs. Bottom line is that in whatever capacity we as employees serve we are here for the students and many of us either do not realize that fact or choose to ignore it. We forget we would not have our jobs unless we have students who need an education and teachers out in the trenches that need our help.
- I am a bus driver so most of this survey did not have anything to do with transportation. This is one area that needs to be addressed because there are a lot of things going wrong. Discrimination, time card tampering, etc... just to name a couple. Why do you think FWISD goes through bus drivers so quick????
- Students (esp. high school) need more consistent discipline starting with principals through administration. Students refer to suspension as a three-day vacation. These three days of being suspended are excused absences therefore students are not disciplined.
- Administrative Personnel (top people) are paid way too high for what they do, especially when (clerical is doing their jobs) and schools need more clerical help to cut down stress from way too much overtime being required to get job done. Clerical (Data clerks, clerks, and secretaries) are doing the job of 2-3 people because administrators say there isn't enough money to hire a full-time body. If they were paid less, they could hire more help out in the schools where it is needed.
- Pay is entirely too low--that's why I will probably not stay in system, and too bad because the need is there at the schools.
- The pay for older employees is not in keeping with the various raises given yearly! I feel TAAS should be done away with and use a method where a student who has completed all required hours can graduate. I work in an elementary school. A lot of these students will not make it to high school. Why can't these students be weeded out and put in a vocational school to learn a trade or job skill????
- I am a part-time, night-time adult education teacher. The quality and quantity of our program has gone down drastically. While funding has been cut and classes reduced, more office and administration staff has grown! The emphasis is no longer on the students but on the following of accountability of testing and paper work. The emphasis of helping adult students to succeed in our society is no longer spoken of in our meetings!
- The FWISD superintendent shows a lack of respect for anyone other than himself. His arrogance is a demoralizing factor. A sense

of appreciation for those of us in the trenches would be a motivation to those well qualified young teachers to remain in the education profession and would be greatly appreciated by the "old timers".

- Basically all facilities are heated and cooled. In order to provide the ultimate environment for learning, these HVAC systems must be maintained for safe operation, health, and cost effective operation of the units themselves. It's not easy to maintain even a fraction of the equipment FWISD has with the number of HVAC employees presently on the work force. The same district which taught us the basic $1+1=2$ expects us to think $1+1+1=2$ Maybe I missed out on the "new" math deal in the 60's.
- Most of these questions do not pertain to my position. However, FWISD is a good old boy practitioner, and very strong in nepotism in hiring practices. I see no chance for my own advancement, as I have no relatives in higher positions to get me that advancement. Our administration is rude, corrupt, and very biased.
- I am a maintenance worker; therefore I am in many different schools. Most of the elementary schools are overcrowded. There are too many portable buildings in use throughout the district. Example: Buildings that are designed to have 500 students routinely have 700-850 students, mainly because of the use of portable buildings. More new elementary schools need to be built instead of adding on to existing ones. I believe smaller schools are more manageable. In the middle schools, the main problem is discipline. There is none! Get the disruptors out of the classroom. Give the children who do not disrupt the class a chance to learn. Right now they do not have a chance - 3 wasted years. One thing that does help is 6th grade schools. We have some need for more. Being a maintenance worker I must say something about our maintenance department. We are spread too thin because of construction we are performing. We can't do both effectively and I do believe that it will affect the education process eventually if not already.
- Education is very important. Educators need support not only by the district but by parents, business and community. There is a lack of support by all! Educators and support staff need to be paid higher salaries! Insurance needs to be lowered in cost! I'm embarrassed to reveal my salary. People ask why am I in education! I reply "to make a difference."
- Gangs and drugs are a problem in FWISD. These problems are prevalent nationwide. However, the district (campuses, central office admin plus our student affairs office) are on top of most situations. During my 28 years with the district, I have been a teacher (14 yrs.), assistant principal (7 yrs.) and central admin (7 years) staffer.

- In FWISD 1999-2000 Annual Report, about 9860 of the 78,000 (12%) students were ignored. These are children whose needs are met with some type of assistance from special education. There is an abundance of pride placed on various initiatives, programs, and high TAAS scores. However, high TAAS scores and recognized or exemplary campus don't mean that the needs of all children (as the FWISD mission statement claims) are being met. Maybe the needs of special populations are not being adequately met because these students, for the most part, are exempt from having to take the TAAS because of their disabilities. And, FWISD definitely takes its lead from the state believing that the TAAS is the end-all for a child's future success in adulthood. Maybe for some but not for all. Whenever attempts like this (the Comptroller) are made where streamlining of funds or strategies to save money are concerned, the first place school administration wants to look is at the special education programs. They want to find out if there is overlapping or duplication of services, which is fine, if it is done correctly, adequately and fairly. For instance, FWISD hired a consultant to, I guess, evaluate the various Special Education Programs. I was at the Board meeting when she presented her report. She cracked a joke about one of their programs saying "All they do at that (program) is make beds." They all laughed. When I told a friend who works in this program about her comment, she said that no consultant had come to visit there. So, I guess the joke is really on all the special education students whose very future depends on these programs and services. To say that they're a duplication of each other is actually saying someone got paid big bucks (now there's a savings) to make a report based more on stereotypes of the disabled than on how they're really being served. Besides, who doesn't like a well-made bed when they have to utilize a hotel? It's honest, decent work for children who are being taught trades so that they can give more to our society financially rather than to take from it. If as much energy was placed on the education of the 12 percent of FWISD's 78,000 children as it is on the other 88 percent, then that would be a "point of pride" (FWISD's motto this year) to pass on. For the most part, however, special education has functioned under the mottos: "pass it down" or "pass 'em over." I'm just support staff. It's teachers who really should be doing this survey. They're the ones with the real experience with FWISD's children. Yet, like always, nobody asked them. "Pass it on!" Note: FWISD uses too many consultants. We can save money by using people who are hired and paid a salary to work for us.
- To Whom It May Concern: The FWISD has improved a lot since I have been working for the dist. I enjoy my job. I thank God for the wonderful staff that we have.

- Some special education students are placed into inappropriate classroom settings with teachers who are not certified to meet their needs. Such placements reflect the philosophy of central administration. In FWISD, building level administrators, teachers, and support staff work diligently to meet the needs of students.
- In-service is repetitive and boring. Presenters from the district are not good at presenting. Topics are often not meeting needs. Some improvement noted this year. We have too many in-service days and not enough preparation days in the classroom. Paperwork requirements in counseling dept.--OVERWHELMING.
- Better pay for all employees of the FWISD and not just pay "Teachers" big salaries. It takes all of us to have a great district. Insurance with Cigna is "horrible". Can we get benefits like state workers. Provide money for each school. The same amount whether east, west, north, or south. Put the same thing in each school.
- I feel that with our superintendent's leadership and interest in our students needs and future, the district has come a long, long way and is of high quality. Yes, there are problems, but the board and staff work together to resolve them. All in all, FWISD is an exceptional district. Thank you.
- I think we need to have more up-to-date trucks. Because our old work truck burns more gas. I feel this will save our school district more money on fuel and this extra money can be used for other causes like education.
- I am proud to serve students in this school district. We still have a long way to go, but I feel the strong commitment to improvement will take us where we need to go. No district is perfect. No district is working harder to be perfect than ours.
- Note: This is not an educational issue. However, it is a money issue. Why does the district spend so many thousands of dollars on food catered to departmental meetings. I'm always questioning this issue. I believe it's excessively abused. This same caterer is utilized at the admin. level. Our tax dollars should go toward education not for free breakfasts, lunches. It should be monitored! If this was to be brought up at a board meeting the public would definitely reply!
- FWISD has many social and emotional needs as far as students. There needs to be more social services. One drug and alcohol specialist per 1,600 students at a major high school with drug problems is a joke. Schools should be identified as high in drug usage and the proper personnel should be assigned with numbers of students in mind. FWISD seems to have just "token" professionals for mental health issues who have no way of being effective due to overwhelming numbers of referrals and complex issues. I would like FWISD to take comprehensive steps to address emotional intelligence so students can move toward intellectual

academic success. A child will not be successful academically until their emotional needs are addressed. Please consider meeting with counselors, psychologists and prevention/intervention specialists to gain an understanding of our student's needs. These people, not their supervisors, are truly on the front lines and have our student's best interests at heart!

- I am not a teacher, I am a school nurse, but from what I can see and I am involved with, I see that the main problem with our low performing school is not the teachers. Many give extra hours after school to students, 5-6 pm when they leave, It's not the bldg. It's old, but there are plenty of computers, too many really. Some classes are too large and classes meet in the cafeteria, the stage of the auditorium and the library. That could be improved. The main problem is the lack of parental involvement and no amount of money can fix that. The students need parents that make education a priority in their lives. Unfortunately, very few children have this. Many parents expect the school to educate the child without any involvement on their part. They do not make the child do his or her work, behave in class, wear the right uniform, get their immunizations on time, come to school for teacher/parent conferences, return phone calls, follow school rules, take the child out of school to go on vacation, etc. I do not know how to make responsible parents.
- Some of these questions I cannot relate to, because I am limited to elementary age children. Some areas really need improvement. Such as discipline in the classroom and hallways. Some kids have lost respect for teachers and principals. When sent to the office the children act as if it is a joke. The office area is just another playground. The custodians cannot perform their duties because the halls are never clear (day custodian) P.S. The security around my school is very lax. Anyone can enter without a pass. I am so afraid that one day there will be a real problem. Thanks.
- FWISD has a strong focus on student achievement and works relentlessly at keeping our schools a place for learning and not "test prep" shops. It gets more challenging every year to keep this trend from sweeping our campuses.
- Admin. Staff is not rewarded by their performance but by who they know or what department they work in. The annual upgrade reviews are a waste of time, unless somebody high enough requests the upgrade for his/her employee. Letters or explanations on how the review was made or what was the decision based on are never directly answered. This only discourages good employees from doing their best if they know their hard work will not be rewarded. The staff in the middle to low or low positions are over worked and under paid while the salaries for higher pay grades keeps increasing.

- FWISD has a long road ahead in order to become a top ranked district. I have been in 5!! This ranks 5th!
- I feel that FWISD is extremely racially-biased on the part of Hispanic/African American administrative staffers and in clerical and secretarial support staff.
- My only comment would be that it is poor judgment on your part to conduct a performance/audit when the district is closing its year for its annual independent audit. You ought to have known this and conducted it in the spring. Some of the districts accounting review controls are cumbersome and the district is not prompt although in its hiring process.
- I feel the FWISD is working very hard to put all students first, however, I'm concerned with "some" parent involvement and lifestyles that some children face every day.
- School district employees need the same health insurance benefits as state employees
- No comment. I'm just a custodian trainee.
- The FWISD has improved drastically in the performance of students on TAAS test. This has been a definite plus for our district.
- Administration support has been steadily declining for the past 5 years. Computer technical support is incredibly inadequate and under staffed. Clerical support on campus is inadequate and the degree of ability of new staffers is declining probably due to low pay. We have plenty of special programs for "special" children, however, the average child receives very little.
- Unfortunately, the FWISD's academic achievement gains seem to be mainly due to a major refocusing of efforts of passing TAAS. On the surface we may shine, but it is only a veneer.
- I truly feel that the FWISD is committed to achieving academic excellence for all students. The district is continually offering staff development for teachers and administrators to grow professionally.
- The new revised administrative/professional pay table was a "slap in the face" for the employees in levels 1-3. Levels 1-3 were lowered, and levels 4 and up were raised. Who do you think does the most work-the higher administration? Guess again.
- I can only say it's getting better. It has the students' best interest at heart.
- The Personnel and Payroll departments are very disorganized and not customer service oriented at all. Needs MUCH improvement.
- District needs a media spokesperson to clean up Personnel dept. Develop a fine arts center.
- I think most of the problems in the classroom stem from poor parenting rather than the district.

- African American students in local area schools have less equipment and the teaching staff is not as experienced. The turnover of staff, principals and teachers are greater than in the other schools. Principal turnover at O.D. Wyatt high school did have a negative effect on my child's education. The lack of stability was a major factor.
- The superintendent and Board do not realize or utilize the library resources and librarians fully to compliment instruction objectives. They don't see how a strong library program supports reading initiative. More visible support needs to be given to this area and the technology it provides and services to students.
- The district has far too many instructional specialists and curriculum, administrative personnel that do not directly impact the educational needs of the students. This personnel could be more effectively used as teachers, thus reducing class size. The district spends far too much on their salary and does not receive educational benefit from it. The district also must purchase office space, supplies, etc. to support these unproductive endeavors. I feel the district had lost its focus on the students.
- Campus secretaries worked the same number of days as the principals this past school year. The principals were given a stipend because they worked through summer school at each campus. The secretaries received nothing. They ordered all supplies and distributed them, typed all reports, enrolled all the students, called each one who did not show up - they did all these extra assignments while still doing their regular assignments with no extra money!! Unfair!
- I feel we are failing to meet the needs of students that need to be in a trade school instead of moving them forward when they do not meet minimum grade level requirements. I wish we had Special Education in a separate facility instead of in regular class schools. What happens is they impact the regular campus with their needs, which disrupt an entire school. It poses constant discipline needs and frequent disruptions by their parents outburst and truly cause serious disruption to total school campus population. There needs to be (2) full-time workers in each elem. school at all times no matter what the school size. There is too much going on for one person to handle due to particular needs of elementary students. The clerk would handle attendance, enrollment, withdrawal, and all student records and student reports.

Appendix C

DISTRICT ADMINISTRATOR AND SUPPORT STAFF SURVEY

D. Narrative Comments - Part 2

The narrative comments below reflect the perceptions and opinions of administrative and support staff survey respondents.

- I feel that our district has reorganized many needs and areas for improvement. Dr. Tocco is working to accomplish these as quickly as possible; however, he has to prioritize needs. I feel that Dr. Tocco has improved our district and that he will continue to do so.
- Have not been with the district long enough to answer most questions with honesty. Can only answer those questions of which I have any or direct knowledge. I believe the Personnel dept. could come into the 2000s. Antiquated hiring process.
- I, as a maintenance worker, have the opportunity to visit all of the schools regularly. It is my opinion that each school is making a good effort to educate their students. I believe they are being supplied with the tools to work with in most cases. However, I believe that discipline could be stricter and the students' parents should be brought up to date regularly with their child's conduct and performance record. (More often than every 3 weeks.)
- I don't believe the administration has its priorities in the right order. It should be children first, and politics last. However, I think it is backward. Also, not enough incentive is given for teachers to stay and tolerate the necessities of babysitting the classrooms. They need help in teaching kids respect for elders as well as the other things. Parent involvement is a must for it to be successful.
- Of the ten years that I have worked for FWISD , I have enjoyed myself. The teachers are great. So is the office staff, and the students are good too!
- I believe there is too much energy put toward OCS! It is a waste of time! The kids (most) would rather sit there than in the class they don't like. Worst of all the students are losing time from other classes, which had nothing to do with the infraction. Punishment is not consistent! Our tax dollars are paying for VP's to sit in their office and slap the hands of kids who become permanent fixtures in their office. (OSC and suspension doesn't work) Also, they establish school rules (Dress code, etc.) and then do not follow through! They spend all that (our) money to create, type, disperse school rules (student handbook), then the kids see that as a joke because two-thirds of the adults ignore the rules! And yes, all of this hinders the educational performance.

- I feel that the FWISD support personnel are the house (sic) that we educate our children in. I also feel without those support personnel the house would soon be not usable. FWISD does not treat employees equally or fairly when it comes to pay. Support personnel's prior employment plays no part in job placement or at what level you are placed on the pay schedule. I have 28 years experience; 8 years ago when I hired on I was placed on the pay schedule with someone with 2 years
- In my opinion teachers are not paid near enough for what they do. The class size is way too high. I have seen as many as 30 children in one class. I also believe that there is no discipline in the schools and the government has taken God out of the schools and then we get left with what we have now. When kids are allowed to run the show what you are left with is chaos. I believe the FWISD is committed to the education of the students for the most part, but class size and government regulation have tied their hands. I think we need more parental involvement and local community involvement. I also believe we should put God and prayer and discipline back in our schools. No matter how many computers and dollars and whatever, nothing is gonna help until you change that. And I thank you for listening.
- As a school counselor, I am concerned first of all that you lump me in either support or administrative staff, which in my district, I am neither. Please revise your survey. I'm also concerned that counselors do not receive computers. I have a good one issued by my principal. I also need clerical staff for my busy schedule. I desperately need good insurance, and uniform regulations for all counselors.
- Need to improve younger grades pre-K-5 like the way they let them go home when the bell rings. Teachers just need to let them go from the class room only to the parents. Please work on that. I am one that is working and think all my child go home with the right person. Thank you.
- I would like to know why every time the district gets a raise the insurance increases. Also, our schools are very clean, but yet we have a lot of our custodians who are pulling a lot of overtime and spending less time with their families. The school district is very short on custodians.
- Truthfully, some of my answers originated more from my experience as a parent of students in this district than from my experience as an employee of the district. Overall, one criticism I have is that problem solving seems to be more crisis centered than preventative. In other words, fires seem to get dealt with as they occur rather than looking ahead and positioning ourselves in a prepared fashion. However, there are also many positive characteristics to the district. I do believe my children are receiving

an education that is preparing them to be contributing members of society.

- Fort Worth has improved quite a bit. It appears that an unusual amount of decisions are not based on needs of our district nor for our students, but on how some of the top administrators feel about certain people. This is noticeable and odd. Although I am a woman, it seems like there is a lopsided number of men administrators, so many women so few men.
- I feel that FWISD is performing at an average rate. However, FWISD has the potential to rate exemplary in all areas. I am stating this because of my experience and exposure to the district's policy and procedures especially when hiring school administrators. I personally feel that there should be a concentrated effort to maintain and continue to seek applicants that are qualified and have a genuine concern for all children in the school system. During my tenure in the system, I have worked with several school administrators that still wonder how they were promoted or selected for such position. Please allow me to explain this statement. Leadership and management of any school must work effectively and in unison within a school administration in order for that school to be successful. However, without either of these qualifications, a school's climate will be affected and therefore, performance of that school will be affected. A good leader should be able to work with all of its employees regardless of their personal desires and personal friends working on their campus. A good leader should be one that can get people to perform to their maximum potential. However, this task can only be completed if the leader has a vision that is aligned with the vision of the district, and is able to clearly communicate this vision. A good leader tries very hard to be fair and consistent with their employees. To be fair to all of the employees on campus, then FWISD need to reevaluate how they allow administrators to transfer employees on the basis of friendship as opposed to qualification. The buddy system of hiring and transferring employees has not been successful in FWISD. The administrators are hired on a buddy system. This is bad for the district and the support staff. If a problem should arise on one of the campuses where the principal is the friend of one of the administrators from the district, then your problem is just what it is, your problem. Please clean this system up!
- FWISD has quality teachers and many excellent administrators, although the superintendent lacks respect. Because of bond election, better facilities with upgraded technology and computers are on the horizon. Special ed programs and support facilities (i.e. SERS) need \$\$ investments to upgrade. Dept. is working to develop more uniform program and implementation across district. Most staff are hopeful. Morale's suffering overall. Issues like

internal promotion, wage rate and understaffing are premium concerns. High turn over in Spec. Ed dept. also is of concern.

- Although TAAS test scores have risen under Dr. Tocco, he is a poor leader. He is very authoritarian-he does not lead so that others will follow, but rather forces principals and teachers to perform by threats and humiliation. This does get short term results, but it leads to stress, chronic illness, early retirement and moves to other districts. Principals bear the brunt of his abuse. The district is losing not only our most experienced professionals, but also promising new teachers who will not put up with these conditions. The system puts extreme efforts, including signing bonuses, in attracting new teachers from other states, but does not hold on to its best and brightest. The worst thing is that the children pay the price. They are in classrooms where often stress is prevalent, staff turnover leads to inconsistency, creativity is curtailed, and the joy of learning has disappeared. The system is tight fisted with providing materials so teachers spend their own money for teaching materials. Teachers who go to other districts are amazed at how their teaching needs are supplied. Teachers, although held accountable for test results, are so busy giving benchmark tests and having children pulled out of classes that they cannot teach the skills they need to teach. Language Center teachers are waiting for another teacher. They are over their limit. They are also still waiting (Oct. 24) for science books. Budgets come out too late in the year. If we start school in August, we need to be able to order supplies before the end of October. The district needs better situations for elementary students that have problems. They can often be identified in preschool and kindergarten by experienced teachers. Early intervention at an alternative school can bolster the child's self-esteem and all teachers to teach the other students. When the child is ready to come back to the regular classroom, he will be ready to learn. It is costly in both time and money for teachers, the other children and for the child affected for it not to be done in a timely manner. It also puts the child at greater risk to be a dropout. Not enough money is paid to technology people to keep them in the school district. We have a lack of experienced people and high turnover. Teachers are not helped with computers enough. The computer situation is very uneven. Some schools have a lot; others have very little. I now have an excellent professional principal. I was ready to retire this year if I had principals like I have had the past four years. In schools where I have been in the last few years discipline was very uneven. Our present principal works hard at being consistent.
- In FWISD, if it isn't TAAS forget it!!
- Low grade overall, cover ups exist, students are statistics not people, staff at my child's school show no personal concern for

most students, many good teachers have fled, retired, at other districts. personnel desperate and hire close to anyone, teaching targeted to TAAS.

- Overall this is an outstanding school district.
- I feel that FWISD continually strives to improve educational delivery and achievement. Overall, this district does an exemplary job! I do have problems with certain purchasing policies that tie our hands from taking advantage of specific discounts. For example, I sponsor a student group that raises its own funds. A company we order from will offer free delivery if payment accompanies order. FWISD policy will not allow any payment until product is received. Depending on the total cost of the order, I am forced to waste anywhere from \$50-\$100 of student money. Without such restrictions, I could be spending that money on children rather than shipping.
- Equal pay for equal work. Same job, same classification over \$4.00 an hour difference. Main trades pay.
- My concern is for the children. There needs to be more emphasis on reading in the lower grades--those who can't (won't) perform are referred to special education. There is no program for those who don't qualify (i.e. slow learners). There is no program for behavior problems in K-2. Children who need counseling (by psychologist) don't receive it in a timely manner. Teachers teach TAAS to extent other subjects are neglected. We have some excellent teachers but inept ones are just moved around, as are administrators. Behavior is also a big concern--many teachers don't know or haven't received training in this area.
- Please look closely at the counseling program. Counselors should be spending time with students, parents and teachers. Too many counselors coordinate test after test. This is not cost-effective nor beneficial to students with social, emotional, educational and occupational concerns.
- Frequently I see behavioral problems with students at elementary age that are kept in the principal/asst. principals office for hours without school work to do or attempted re-admittance to classroom (eventually child falls asleep). This isn't education! I think elementary age refugee students should be required to go to a school to learn English for at least 1 year, before going to regular elementary school so that they can speak, read and fill out bubble tests.
- I myself feel that they have not giving the cafeteria workers enough credit for what they do with food and caring for the students' lunches. They are the ones who don't get noticed for annual raises to meet there needs. I do understand the teachers are good in classrooms, but we are needed as much for the students.

- The student-to-teacher ratio is appalling, central administration, but specifically Human Resources and Payroll, are they poorest run-places in the state. As far as I've seen, they continue to lose many good or best employees in all areas because of their unprofessionalism and extremely poor attitude. I have witnessed many good prospects leave after seeing this area and move to another district
- All schools need a full-time art and music teacher. Advance placement support is needed; foreign language needed at the elementary level. Capital outlay and other needs are not being addressed.
- Currently, we have 21 students who are waiting for us to make earmolds (either for their personal hearing aids, or for their school auditory trainers). We have been told that, until the budget is straightened out (it is Oct), we can't make any new earmolds!! In the meantime, a few of these (students) have no earmolds (thus no amplification at school). This amplification is in their IEP's. These are the frustrating things for us.
- FWISD could re-direct funds spent on providing food, refreshments, etc. at called meetings to instructional supplies. Some travel expenses could be re-directed.
- Eleven children in PPCD unit per one teacher and one aide extremely unsafe. Part-time nurse less than adequate. All schools need full-time clerk and nurse and better ratio of special needs students to staff.
- I don't know why the district needs to go to other countries and states to bring teachers to work for our district. Some of them or most of them have no idea what they are coming to. Our district has a wide variety of cultures that some of the new teachers are shocked to see so many different cultures and why do we bring people from Spain when their Spanish is so much different from here. [The district is] just spending tax payer monies [because] they don't stay and they don't like our kids. Texas has a lot of teachers--just look and offer what you offer other countries. Keep the \$ here-not somewhere else. And, why does administration always get the big raises especially the ones that are already making above \$60. Take a good look at who making the big bucks and still they are never happy. Does Dr. Tocco know what and why teachers leave? Why doesn't anyone take a look at what's going on in HR in all those floors at the Admin. Bldg.
- I have worked with most of the administrative and support staff over the years and found most people to be sincerely dedicated to educating the children of the FWISD. FWISD requires a massive amount of labor to provide ITS services to 146 locations. The ITS department is currently operating with a staffing deficiency. And will continue to do so until salary and job assignments are

reviewed and corrected by someone who has the authority to make changes. Several of the ITS staff have resigned and have not been replaced and an increase in personnel has been rejected by upper level management. There are also several key people looking for a position where the pay is on a par to current industry demands. Another unique problem is that people can stay days behind just doing "stop what you are doing and handle this" projects. Almost all of our managers have been promoted from within mainly because so few applicants from outside FWISD apply for advertised positions. Now the newly promoted managers have a new assignment and must also perform old duties as well. Yes, good things are happening at FWISD! Streamlining of the decision making process and increasing technical staffing would make even more good things happen.

- There are far too many overpaid chiefs (i.e. associate superintendents, team leaders and team members, etc.). Teachers should be allowed to implement their own choices in curriculum, as long as it meets with all the state requirements, etc. and teach the children. I think the district would save many thousands of dollars on initiatives by letting the teachers do their job the best way they know how. There should be programs like at PHS (i.e. Honors, Essentials, AP) at every high school in the district and there should be a John Hamilton at every high school. Something needs to be done about the way in which the school board conducts its meetings. They cannot make rational decisions at 2:00 a.m. I think they ramble on and like to hear themselves.
- The mission of instruction is the focus and achievement scores reflect steady improvement.
- Non-instruction; Favoritism: assignments of jobs and bus routes; Parts: no control of parts in supply room; Supervising: poor in all areas of transportation; Vendor products: being sold on school time (Mary Kay cosmetics).
- Fort Worth educational performance has taken a step in the right direction, you can see this by the hard work and dedication of the teachers/students. More schools are becoming recognized and exemplary and etc.
- We desperately need to stop teaching TAAS and let good teachers teach. We need art and music on a regular basis. We need to make school a fun and interesting place to be. Teachers and support staff need to be encouraged and rewarded for commendable work not just for longevity.
- The students-to-teacher ratio in middle school is higher than at any other level. The middle school student is at a critical juncture. The higher ratio does not make sense.
- Not enough continuing education for administrative employees, some groups are overworked and underpaid (i.e. technology), other

groups are underpaid (i.e. food service), administrators needed, but not as many associate superintendents needed. Maybe downgrade to assistant superintendents or directors or executive directors; too much stress on HAP program students; too much stress placed on teachers due to HAP program students; low and average achievers not given same opportunities as high achievers; programs are expected to be implemented too rapidly with too few employees many times; the corporate world usually provides the resources, training and funds necessary for a true success. FWISD has competent employees overall, but many times they unnecessarily are dumped on. Overall, FWISD is a good place to work. I do believe we better quit unnecessarily pressuring our good employees if we expect to keep them. We also need to pay fair market rate in all areas and some still need adjustments even after TASB salary study.

- FWISD has not yet developed any programs to meet the needs of children who have low ability (intellectual and academic). Yes, elementary teachers do all they can to help them feel successful in class, but when they move to MS and HS they are [lost] and have no other options but to join gangs and/or drop out of school. Can't anybody do something? Other states have programs (vocational) to help these students. Why can't Dr. Tocco "create" another Initiative for these students?
- I am concerned that Deaf Education falls under special education. I think Deaf Education should be separate with its own budget and directors qualified to understand and deal with [their] concerns.
- I can't tell you a correct status of the overall educational performance of FWISD . But in reference to identifying opportunities to save money, I can tell you this for sure: FWISD does not have and does not practice preventive maintenance of heating, ventilation, and air conditioning equipment. Equipment fails prematurely and runs inefficiently. The custodial staff in the schools are not trained and do not have any procedures to effectively shut down and start up chill water systems, locally when it is needed. There are many schools where inefficient AC units run 24 hours a day, 7 day a week. Great waste of energy and money. We have a great effort from the principals, teachers and custodians throughout the district, in eliminating the waste. Unfortunately, none from the maintenance department.
- We need to spend more time and money on and for the students- too much standardized testing. Down with TAAS. Good teachers should be allowed to teach. There are too many "chiefs". Too much money spent on food and travel. Technology department is in sad shape - an embarrassment for the size and wealth of the district. Health insurance needs reworking.

- Educational performance has improved considerably. The focus on academics and on school campus and student analysis of need has made a very positive impact. It's been a sustained team effort to attack problems on multiple fronts. The truancy program, Access, the success evening high school, Advanced academic services, ESL (revamping schools) more language centers and targeted efforts to improve increase community involvement (forums, communication, awards programs, etc.).
- If the district does not plan for replacing computers when they are obsolete, one should be made. Computers should meet industry standards (and be kept up to date) especially if they are used in the classes which prepare students for work.
- Administrators at the administration building often make demands of employees and professional staff at schools without regard for practicality of a school situation; not enough planning time before demands are made. Some administrators have never worked in the school although they are responsible for making demands on professionals with no concept of what is realistic and doable.
- I have 26 years experience working for FWISD. Hiring: The superintendent has by far reached a level which is comfortable in hiring of Hispanics in the district. Students: Good schools for a diverse population. Food: Needs great improvement in the school cafeteria. Student Affairs: Needs improvement in hiring/disciplining.
- The district does not seem to be aware of the workload the nurse undertakes. The nurses are neglected. They are not regarded as an important part of the school setting. Nurses are very isolated. The furniture is old and the offices are not well maintained in comparison with other offices in the school building. As professionals, the nurses' salary is the lowest among all others. We are expected to care for all students, staff, faculty and the community, not to take a lunch or be the last to do so. Keep up with records, etc.
- The questions in this form really have no application for the Transportation dept. employees. If it did, you would hear that our director and management never support a driver and we are constantly threatened. As long as this is allowed to continue, FWISD transportation will continue to lose good employees and children will continue to be placed at risk.

Appendix D

PRINCIPAL AND ASSISTANT PRINCIPAL SURVEY RESULTS

A. Demographic Data

STATEMENT		CATEGORY		
		No Response	Male	Female
1.	Gender (Optional)		28%	72%

STATEMENT		CATEGORY					
		No Response	Anglo	African-American	Hispanic	Asian	Other
2.	Ethnicity (Optional)		39.4%	28.7%	31.9%	0%	0%

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 Austin ISD?		15.5%	10.7%	18.4%	12.6%	42.7%

STATEMENT		CATEGORY			
		PK-5	K-5	6-8	9-12
4.	What grades are taught at your school?	35%	49.4%	24.6%	23.3%

Appendix D

PRINCIPAL AND ASSISTANT PRINCIPAL SURVEY RESULTS

B. Survey Questions

A. District Organization and Management

STATEMENT		CATEGORY					
		No Response	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The school board allows sufficient time for public input at meetings.		27.7%	56.4%	9.9%	5.9%	0%
2.	School board members listen to the opinions and desires of others.		24.3%	59.2%	7.8%	7.8%	1%
3.	School board members understand their role as policymakers and stay out of the day-to-day management of the district.		10.7%	45.6%	10.7%	23.3%	9.7%
4.	The superintendent is a respected and effective instructional leader.		25.7%	43.6%	12.9%	14.9%	3%
5.	The superintendent is a respected and effective business		24.8%	45.5%	15.8%	10.9%	3%

	manager.						
6.	Central administration is efficient.		3%	45%	13%	35%	4%
7.	Central administration supports the educational process.		15%	58%	9%	15%	3%
8.	The morale of central administration staff is good.		5.9%	37.6%	28.7%	21.8%	5.9%

B. Educational Service Delivery and Performance Measurement

STATEMENT		CATEGORY					
		No Response	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
9.	Education is the main priority in our school district.		47.5%	47.5%	3%	2%	0%
10.	Teachers are given an opportunity to suggest programs and materials that they believe are most effective.		14.6%	60.2%	3.9%	17.5%	3.9%
11.	The needs of the college-bound student are being met.		15.5%	55.3%	21.4%	7.8%	0%
12.	The needs of the work-bound student are being met.		7.8%	43.7%	27.2%	20.4%	1%

13.	The district provides curriculum guides for all grades and subjects.		28.2%	56.3%	3.9%	9.7%	1.9%
14.	The curriculum guides are appropriately aligned and coordinated.		28.4%	52%	7.8%	9.8%	2%
15.	The district's curriculum guides clearly outline what to teach and how to teach it.		27.5%	56.9%	4.9%	8.8%	2%
16.	The district has effective educational programs for the following:						
	a) Reading		42.7%	47.6%	3.9%	4.9%	1%
	b) Writing		15.5%	55.3%	9.7%	18.4%	1%
	c) Mathematics		33%	55.3%	5.8%	4.9%	1%
	d) Science		11.7%	55.3%	9.7%	21.4%	1.9%
	e) English or Language Arts		19.4%	65%	1.9%	12.6%	1%
	f) Computer Instruction		8.7%	37.9%	15.5%	33%	4.9%
	g) Social Studies (history or geography)		7.8%	61.2%	6.8%	22.3%	1.9%
	h) Fine Arts		6.8%	49.5%	13.6%	23.3%	6.8%
	i) Physical Education		6.9%	71.3%	8.9%	11.9%	1%

	j) Business Education		5.8%	36.9%	46.6%	8.7%	1.9%
	k) Vocational (Career and Technology) Education		4.9%	36.9%	41.7%	15.5%	1%
	l) Foreign Language		7.8%	43.7%	32%	14.6%	1.9%
17.	The district has effective special programs for the following:						
	a) Library Service		11%	60%	18%	8%	3%
	b) Honors/Gifted and Talented Education		15.5%	72.8%	3.9%	7.8%	0%
	c) Special Education		15.8%	61.4%	5.9%	12.9%	4%
	d) Head Start and Even Start programs		6.9%	37.6%	49.5%	5%	1%
	e) Dyslexia program		1.9%	38.8%	39.8%	11.7%	7.8%
	f) Student mentoring program		3.9%	50.5%	25.2%	19.4%	1%
	g) Advanced placement program		18.4%	58.3%	21.4%	1.9%	0%
	h) Literacy program		15.8%	59.4%	17.8%	6.9%	0%
	i) Programs for students at risk of dropping out of school		7.8%	45.1%	14.7%	22.5%	10%

	j) Summer school programs		17.5%	68.9%	5.8%	7.8%	0%
	k) Alternative education programs		12.6%	45.6%	9.7%	24.3%	7.8%
	l) "English as a second language" program		22.3%	66%	2.9%	7.8%	1%
	m) Career counseling program		1.9%	40.8%	38.8%	17.5%	1%
	n) College counseling program		2.9%	45.6%	39.8%	9.7%	1.9%
	o) Counseling the parents of students		6.8%	41.7%	22.3%	22.3%	6.8%
	p) Drop out prevention program		4.9%	35.9%	34%	20.4%	4.9%
18.	Parents are immediately notified if a child is absent from school.		12.7%	37.3%	3.9%	40.2%	5.9%
19.	Teacher turnover is low.		3.9%	24.3%	11.7%	43.7%	16.5%
20.	Highly qualified teachers fill job openings.		2%	51%	6.9%	31.4%	8.8%
21.	Teachers are rewarded for superior performance.		2.9%	24.5%	9.8%	53.9%	8.8%
22.	Teachers are counseled		13.6%	70.9%	1.9%	12.6%	1%

	about less than satisfactory performance.						
23.	All schools have equal access to educational materials such as computers, television monitors, science labs and art classes.		3.9%	24.5%	11.8%	42.2%	17.6%
24.	Students have access, when needed, to a school nurse.		39.1%	51.5%	3.9%	11.7%	3.9%
25.	Classrooms are seldom left unattended.		22.8%	61.4%	5.9%	8.9%	1%

C. Personnel Management

STATEMENT		CATEGORY					
		No Response	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
26.	District salaries are competitive with similar positions in the job market.		7.8%	42.2%	5.9%	31.4%	12.7%
27.	The district has a good and timely program for orienting new employees.		8.8%	65.7%	7.8%	15.7%	2%
28.	Temporary workers are rarely used.		2%	19.6%	19.6%	48%	10.8%

29.	The district successfully projects future staffing needs.		3.9%	50.5%	19.4%	21.4%	4.9%
30.	The district has an effective employee recruitment program.		11.7%	51.5%	18.4%	11.7%	6.8%
31.	The district operates an effective staff development program.		13.6%	59.2%	5.8%	15.5%	5.8%
32.	District employees receive annual personnel evaluations.		34%	58.3%	4.9%	1.9%	1%
33.	The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.		1%	20.4%	15.5%	45.6%	17.5%
34.	Employees who perform below the standard of expectation are counseled appropriately and timely.		6.8%	55.3%	13.6%	16.5%	7.8%
35.	The district has a fair and timely grievance		6.8%	68.9%	16.5%	4.9%	2.9%

	process.						
36.	The district's health insurance package meets my needs.		1.9%	24.3%	4.9%	35%	34%

D. Community Involvement

STATEMENT		CATEGORY					
		No Response	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
37.	The district regularly communicates with parents.		12.9%	75.2%	4%	7.9%	0%
38.	Schools have plenty of volunteers to help student and school programs.		3%	24.8%	4%	58.4%	9.9%
39.	District facilities are open for community use.		13.7%	68.6%	12.7%	2.9%	2%

E. Facilities Use and Management

STATEMENT		CATEGORY					
		No Response	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
40.	Parents, citizens, students, faculty, staff and the board provide input into facility planning.		10.8%	46.1%	17.6%	22.5%	2.9%

41.	Schools are clean.		11%	67%	5%	12%	5%
42.	Buildings are properly maintained in a timely manner.		5%	41.6%	5%	32.7%	15.8%
43.	Repairs are made in a timely manner.		2.9%	21.6%	5.9%	46.1%	23.5%
44.	Emergency maintenance is handled promptly.		10.8%	52%	2.9%	24.5%	9.8%

F. Financial Management

STATEMENT		CATEGORY					
		No Response	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
45.	Site-based budgeting is used effectively to extend the involvement of principals and teachers.		18.6%	67.6%	5.9%	7.8%	0%
46.	Campus administrators are well trained in fiscal management techniques.		7.8%	46.1%	9.8%	34.3%	2%
47.	Financial resources are allocated fairly and equitably at my school.		17.6%	62.7%	6.9%	11.8%	1%

G. Purchasing and Warehousing

STATEMENT		CATEGORY					
		No Response	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
48.	Purchasing gets me what I need when I need it.		5.9%	56.9%	10.8%	24.5%	2%
49.	Purchasing acquires high quality materials and equipment at the lowest cost.		3.9%	56.9%	17.6%	19.6%	2%
50.	Purchasing processes are not cumbersome for the requestor.		4.9%	51%	15.7%	23.5%	4.9%
51.	The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.		9.8%	69.6%	7.8%	12.7%	0%
52.	Students are issued textbooks in a timely manner.		17.6%	61.8%	3.9%	12.7%	3.9%
53.	Textbooks are in good shape.		15.8%	78.2%	3%	3%	0%
54.	The school library meets student needs for books and other		16.8%	61.4%	3%	15.8%	3%

resources.							
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H. Food Services

STATEMENT		CATEGORY					
		No Response	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
55.	The cafeteria's food looks and tastes good.		2%	45.5%	10.9%	30.7%	10.9%
56.	Food is served warm.		11.8%	64.7%	5.9%	14.7%	2.9%
57.	Students have enough time to eat.		8.8%	71.6%	2.9%	12.7%	3.9%
58.	Students eat lunch at the appropriate time of day.		12.7%	76.5%	2.9%	5.9%	2%
59.	Students wait in food lines no longer than 10 minutes.		13.7%	63.7%	2.9%	14.7%	4.9%
60.	Discipline and order are maintained in the school cafeteria.		19.6%	71.6%	3.9%	3.9%	1%
61.	Cafeteria staff is helpful and friendly.		23.5%	59.8%	5.9%	10.8%	0%
62.	Cafeteria facilities are sanitary and neat.		25.5%	64.7%	3.9%	4.9%	1%

I. Transportation

STATEMENT		CATEGORY					
		No Response	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
63.	The drop-off zone at the school is safe.		7.8%	64.7%	4.9%	15.7%	6.9%
64.	The district has a simple method to request buses for special events.		5.9%	79.4%	2.9%	8.8%	2.9%
65.	Buses arrive and leave on time.		2%	44.1%	5.9%	39.2%	8.8%
66.	Adding or modifying a route for a student is easy to accomplish.		26.5%	18.6%	46.1%	8.8%	0%

J. Safety and Security

STATEMENT		CATEGORY					
		No Response	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
67.	Students feel safe and secure at school.		28.4%	67.6%	2%	1%	1%
68.	School disturbances are infrequent.		23.5%	63.7%	2.9%	8.8%	1%
69.	Gangs are not a problem in this district.		2%	29.4%	19.6%	37.3%	11.8%
70.	Drivers are not		1%	29.4%	20.6%	41.2%	7.8%

	a problem in this district.						
71.	Vandalism is not a problem in this district.		1%	25.5%	13.7%	52%	7.8%
72.	Security personnel have a good working relationship with principals and teachers.		17.6%	73.5%	2.9%	3.9%	2%
73.	Security personnel are respected and liked by the students they serve.		13.9%	73.3%	10.9%	2%	0%
74.	A good working arrangement exists between the local law enforcement and the district.		21.6%	64.7%	7.8%	5.9%	0%
75.	Students receive fair and equitable discipline for misconduct.		26.5%	63.7%	3.9%	4.9%	1%
76.	Safety hazards do not exist on school grounds.		10.8%	54.9%	6.9%	24.5%	2.9%

K. Computers and Technology

STATEMENT	CATEGORY
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		No Response	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
77.	Students regularly use computers.		22.3%	41.7%	2.9%	26.2%	6.8%
78.	Students have regular access to computer equipment and software in the classroom.		17.5%	38.8%	2.9%	33%	7.8%
79.	Computers are new enough to be useful for student instruction.		14.7%	43.1%	4.9%	23.5%	13.7%
80.	The district meets student needs in computer fundamentals.		6.8%	38.8%	4.9%	33%	16.5%
81.	The district meets student needs in advanced computer skills.		3.9%	21.6%	20.6%	35.3%	18.6%
82.	Teachers know how to use computers in the classroom.		2.9%	40.8%	7.8%	39.8%	8.7%
83.	Teachers and students have easy access to the Internet.		4.9%	31.1%	6.8%	36.9%	20.4%

Appendix D

PRINCIPAL AND ASSISTANT PRINCIPAL SURVEY RESULTS

C. Narrative Comments

The narrative comments below reflect the perceptions and opinions of principal and assistant principal survey respondents.

- School board members are involved in personnel decisions that have to do with likes and dislikes rather than ability. This meddling is counter productive to the educational performance. Politics as usual.
- Alternative placement for elementary students; more qualified teachers in educationally disadvantaged settings; insurance is too high.
- Many statements were difficult to answer because I've only been in Fort Worth for two and one-half months.
- It was difficult to answer the questions in a seemingly "black & white" answer method. It would have been helpful to have a small comment section near the end of each group of questions.
- Payroll is not responsive to teachers. If payroll makes a mistake, they will not correct it until the next month. This is tough for teachers who only get paid once a month. I also do not feel all schools are treated in an equitable manner on staffing and facilities. Also class sizes in the middle school are too large for effective teaching.
- I do feel the district is academically focused; however, I do feel there is inequality within salaries and expectations of administrators.
- We are striving to become the best.
- Strongly disagree with textbooks issued in a timely manner is specifically devoted to Braille & large print books that take over six weeks to get from Austin to the FWISD warehouse to school sites.
- Promotion practices are based on affirmative action, not competence. Personnel are not rewarded for outstanding achievement. Position advertisements are often posted in local buildings after opening is already closed. Employees are not notified by the Personnel department when they are promoted.
- Transportation department is incompetent.
- I believe FWISD is way in front of Texas major districts in regards to focused instructional academic efforts. There is a lot of teamwork that contributes to high scores. If we are lacking anywhere it is with enough available computers for all students

overall this is a great district to work always on the cutting edge of academic excellence.

- The use of intimidation is a common practice by elementary operations against principals.
- One of our greatest problems lies with the maintenance department. Work orders are submitted and if you're lucky, your needs are met. There is a tremendous amount of wasted time and materials. The PM does not come around often enough to meet the schools' needs. The maintenance personnel are rude and take time to fill out work orders. It takes too much time to have work orders filled, not only on the computer but work orders have to be followed up by several phone calls before the maintenance department comes to your school.
- Compared to state and national surveys, top management officials, including the superintendent, are paid a higher rate than other employees. Qualified teacher recruitment needs improvement; substitutes for teachers and campus monitors need improvement. Effective alternative placement programs need to be established. Staffing needs for individual schools need to be based on community demographics rather than student population. Schools in gang areas need more monitors than schools that don't have gang problems.
- Overall, I think the FWISD is a good one; academic excellence is the focus! Paper work is awesome, however, for both administrators and teachers the paperwork required by federal government for bilingual/ESL programs and special education is truly horrendous. You could drown in the cellulose. And I definitely feel that central administration is too bloated (not the administration in the school). I do not understand why FWISD does not allow for a substitute when a school administrator is out unless its purely to save money. At our school we have three administrators but two of them must be out before a substitute is allowed. Everyone at our school except for administrators and custodians gets a substitute. Is the role of the administrator inconsequential? Also, please help get a state-funded health program for public school educators. It will help attract and keep good employees. We are important; show us you realize this.
- Area I and Area II operate differently. Principals feel supported by central administration on the whole but here needs to be more communication between central office departments. Central office needs to be more streamlined. Many departments from central request the same info in different formats; it is very timely for principals when time should be focused on instruction. FWISD does a very good job for a large urban district
- We want state paid health insurance.

- FWISD's strength is the commitment to learning. The instructional needs of each child are the first priority.
- I think FWISD is working very hard to catch up in technology. Issues in this large district are difficult to monitor, adjust to and for maintain effectiveness. Overall, I think it's a great district with student-focused intent.
- I have been assistant principal in two schools so I can only speak for these two schools. When I marked disagree it was when I felt things could be better than they are. I don't mean to imply that they are unmanageable. However, there is room for improvement. Over the years the teachers are having less input and moral has gone down due to increased pressure from administration. Lack of shared vision is a problem.
- I've never been more proud to say I'm a FWISD employee than I have been for the last four to five years. We have a strong focus on each individual child's success and the district financial and staff development support has been excellent. I also admire our superintendent for insisting on direct instruction in the areas of math, reading and writing.
- Our superintendent is not very friendly and he lacks people skills but he does know how to accomplish business deals. The menus for elementary school students are for the birds. Whoever plans the menu for our kids needs some new insight. Music and art should be available in all schools. There are problems in every area of a school system but they are outweighed with many, many good things. I'm glad I work for FWISD. Things could be a lot worse.
- FWISD is moving in a positive direction. We have a way to go in some areas. I believe the majority of employees are positive and want to see district efforts succeed. Large constituency community groups ramrod ideas that are often incorrect and school district efforts to appease them can often be one size fits all and actually harm existing programs.
- Academic achievement improvement is due to a clear focus and many professionals working to provide the safest, most effective learning environment.
- Central administration needs to support and help new principals 0-3 yrs. experience. I am very disappointed that #33 is not endorsed in this district. It's more who you know not your experience that counts. The most qualified are not being promoted. I truly believe the children must be put first and they deserve the best. This district is moving forward, but it needs lots of tweaking to shape up and serve all stakeholders fairly.
- I think that instructionally, the district is excellent! Bilingual stipends should be given to bilingual principals, in bilingual schools, who passed the district's bilingual test. Secretaries and assistants receive this stipend but not principals! Yet, the latter are

the ones that converse more with parents, send bilingual information home and hold bilingual meetings.. not to mention translate at ARD meetings, for counselors, nurses, etc!

- School board members have too much input into personnel matters, especially that of school administrators. Salaries for school administrators do not reward those that commit long-term to educating the FWISD students.
- I do feel that student academic performance & general welfare are the districts top priorities. I feel, however, that all schools should have access to new technology, additional tutorial monies, etc., not just those schools in impoverished areas. We all have needs. Also, there seems to be nice, clear cut hiring practice. Some people don't interview as well as others, yet they are very capable. These people consistently get passed over for advancement while others, perhaps to meet quotas, are promoted. Some of these people are less capable than their passed-over peers. Many aspects should be considered for promotion. People applying for advancement are never really told where they stand or if there is any chance for them. Certain central office departments, such as Information Services and the Maintenance, Operations, & Construction Department, are very slow in responding to campus level concerns. We most often get voice mail.
- This is a district of teachers and administrators operating under duress. Our Exec. Staff, Supt., all leaders with an iron fist. We have excellent personnel in this district who are not being utilized for their strengths. Because of this, we've lost good people. I enjoy my role as principal because of the children, but the bureaucracy and threats are not needed. Anytime you have to invoke state law to keep teachers from resigning, there's a problem. I hope this survey tells the true story, others have not.
- I am concerned that there isn't a program in place for students who are slow learners. These children seem to fall between the cracks because they're not low enough to qualify for Special Ed and yet struggle with on-grade curriculum. Also, there isn't a program this is successful for those students who have behavioral problems or issues. The district's Behavior Improvement Class (B.I.C) is just a baby-sitting service with substitutes who don't know what they're doing. Fort Worth ISD is continually shuffling administrators around. Assistant principal's get shuffled from school to school every other year. No one is given enough time in one place to get familiar with the school staff and the school's community before they're moved around. In Fort Worth ISD, incompetence is rewarded with higher paying positions as principals and directors in elementary operations. Any school can become exemplary or recognized in Fort Worth ISD if they have 25 percent of their student population in Special Ed. So, is that school or schools

really exemplary or recognized? Inclusion is many times not practiced. Principals are told that they will be recognized or exemplary or else, by director's of elementary operations. Intimidation is the rule of thumb in Fort Worth ISD.

- Extra responsibilities have been placed on the school campus such as input of POs [purchase orders], input of student grades for report cards, soon to be printed at the campus etc. Staff (secretary/clerk) are not compensated for having the extra responsibilities while taking care of the basic everyday business of running the school office. In the absence of the school nurse, the office staff is required to administer medicine or cover the nurse's office for other concerns.
- FWISD ISD is making strides to meet the need of each and every student in this district. Even the short amount of time that I have been here, I have been impressed with much of the programs, instructional help, and personnel. There are areas that still need some special attention: SPED [special education]- the level of knowledge of campus administrators is lacking in this area, therefore errors are made unintentionally and SPED services are administered haphazardly for students in need. ESL training for elementary is strong, but weakens at middle level --- some of these students fall through the cracks.
- The superintendent is very focused on improvement but he doesn't treat his principals with dignity/respect when they are experiencing difficulties in their positions. No support-positive-for growth. I've heard lots of resentment from administrators in the district toward him. Schools are improving, though!
- Too much emphasis on TAAS.

Appendix E

TEACHER SURVEY RESULTS

A. Demographic Data

STATEMENT	CATEGORY		
	No Response	Male	Female
Gender (Optional)		16%	84%

STATEMENT	CATEGORY					
	No Response	Anglo	African-American	Hispanic	Asian	Other
Ethnicity (Optional)		70.9%	14.2%	12.1%	0.8%	2.1%

STATEMENT	CATEGORY					
	No Response	1-5 years	6-10 years	11-15 years	16-20 years	20+ years
How long have you been employed by Austin ISD?		40.4%	18.9%	15.3%	9.9%	15.5%

STATEMENT	CATEGORY					
How long have you been employed by Fort Worth ISD?	NUMBERS NOT PROVIDED					

STATEMENT	CATEGORY						
	PK	K	1	2	3	4	5
What grade(s) do you teach this year?	6.2%	9%	17.1%	14.3%	16.4%	16.7%	15%
	6	7	8	9	10	11	12
	12.4%	14.3%	15%	18.3%	20.5%	18.3%	15%

Appendix E

TEACHER SURVEY RESULTS

B. Survey Questions

A. District Organization and Management

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The school board allows sufficient time for public input at meetings.	8.2%	42%	40.8%	7.5%	1.4%
2.	School board members listen to the opinions and desires of others.	4.8%	44.2%	31%	17.1%	2.9%
3.	School board members work well with the superintendent.	9.4%	52.9%	32.5%	4.8%	0.5%
4.	The school board has a good image in the community.	10%	55.7%	18.7%	12.7%	2.9%
5.	The superintendent is a respected and effective instructional leader.	7.9%	36.8%	15.9%	27.9%	11.5%
6.	The superintendent is a respected and effective business manager.	6.3%	42.2%	23.1%	20.5%	8%

B. Educational Service Delivery and Performance Measurement

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
7.	Central administration is efficient.	3.1%	29.4%	13.5%	35.9%	18.1%
8.	Central administration supports the educational process.	4.8%	47.7%	15.2%	21.7%	10.6%
9.	The morale of central	2.9%	28.3%	47.9%	15.7%	5.1%

	administration staff is good.					
10.	Education is the main priority in our school district.	25.7%	50%	3.4%	13.7%	7.2%
11.	Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	8.7%	35.9%	12%	33%	10.4%
12.	The needs of the college-bound student are being met.	8.4%	37.7%	30.8%	16.3%	6.7%
13.	The needs of the work-bound student are being met.	6.5%	31.7%	31.7%	24%	6.2%
14.	The district provides curriculum guides for all grades and subjects.	17.9%	53.3%	6.7%	17.9%	4.1%
15.	The curriculum guides are appropriately aligned and coordinated.	13.2%	49.5%	10.8%	20.7%	5.8%
16.	The district's curriculum guides clearly outline what to teach and how to teach it.	12.9%	47.2%	10.6%	24%	5.3%
17.	The district has effective educational programs for the following:					
	a. Reading	18.5%	57.9%	8.7%	11.5%	3.4%
	b. Writing	10.4%	54.5%	15.4%	16.4%	3.4%
	c. Mathematics	15.1%	60.9%	8.2%	12.5%	3.4%
	d. Science	9.6%	49.9%	21.3%	14.9%	4.3%
	e. English or Language Arts	10.2%	58.5%	15.8%	13.8%	1.7%
	f. Computer Instruction	4.6%	33.5%	22.9%	27.5%	11.6%
	g. Social Studies (history or geography)	6.3%	50.5%	20.8%	18.4%	4.1%

	h. Fine Arts	4.6%	32.5%	21.6%	27.6%	13.7%
	i. Physical Education	8.9%	48.1%	20%	17.5%	5.5%
	j. Business Education	4.8%	26.9%	56.9%	7.7%	3.6%
	k. Vocational (Career and Technology) Education	5.7%	24.2%	53.1%	9.8%	7.2%
	l. Foreign Language	4.3%	33.4%	47.6%	9.9%	4.8%
18.	The district has effective special programs for the following:					
	a. Library Service	8.2%	52.4%	24.3%	13%	2.2%
	b. Honors/Gifted and Talented Education	11%	60.1%	11.9%	13.6%	3.3%
	c. Special Education	10.5%	50.5%	11.2%	19.4%	8.4%
	d. Head Start and Even Start programs	6%	28.9%	55%	7.7%	2.4%
	e. Dyslexia program	3.1%	16.6%	54.6%	18.8%	7%
	f. Student mentoring program	5.5%	32.8%	40.9%	17.2%	3.6%
	g. Advanced placement program	8.6%	40%	42.3%	6.2%	2.9%
	h. Literacy program	6.9%	36%	44.9%	10.5%	1.7%
	i. Programs for students at risk of dropping out of school	5%	29.4%	36.4%	23.9%	5.3%
	j. Summer school programs	10.5%	51.4%	22.2%	12%	3.8%
	k. Alternative education programs	7%	33.7%	38.8%	13.8%	6.6%
	l. English as a Second Language program	14%	51.7%	19.1%	11.6%	3.6%
	m. Career counseling program	2.7%	21.8%	54.2%	16.9%	4.4%
	n. College counseling program	3.1%	24.4%	53.6%	15%	3.9%

	o. Counseling the parents of students	4.1%	27%	33.5%	27.7%	7.7%
	p. Drop out prevention program	2.7%	20.4%	50.7%	19.4%	6.8%
19.	Parents are immediately notified if a child is absent from school.	7.5%	30.2%	15.8%	34.3%	12.2%
20.	Teacher turnover is low.	3.6%	11.7%	8.5%	42.2%	34%
21.	Highly qualified teachers fill job openings.	3.4%	29.4%	11.7%	40.9%	14.6%
22.	Teacher openings are filled quickly.	1.9%	21.5%	15.3%	42.4%	18.9%
23.	Teachers are rewarded for superior performance.	2.4%	9.4%	9.2%	41.3%	37.7%
24.	Teachers are counseled about less-than-satisfactory performance.	4.8%	43.2%	30.2%	16.2%	5.6%
25.	Teachers are knowledgeable in the subject areas they teach.	11.8%	62.9%	10.6%	11.8%	2.9%
26.	All schools have equal access to educational materials such as computers, television monitors, science labs and art classes.	3.4%	14.1%	9.2%	36.2%	37.1%
27.	The students-to-teacher ratio is reasonable.	5.3%	30.3%	4.8%	34.4%	25.2%
28.	Classrooms are seldom left unattended.	13.6%	60.3%	9.2%	11.9%	4.9%

C. Personnel Management

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
29.	District salaries are	6.8%	34.6%	4.8%	32.7%	21.1%

	competitive with similar positions in the job market.					
30.	The district has a good and timely program for orienting new employees.	6%	47.2%	17.3%	22.4%	7%
31.	Temporary workers are rarely used.	2.2%	13.2%	23.1%	39.9%	21.6%
32.	The district successfully projects future staffing needs.	2.4%	18.3%	32%	32.3%	14.9%
33.	The district has an effective employee recruitment program.	4.1%	30%	34.3%	22.7%	8.9%
34.	The district operates an effective staff development program.	6.3%	31%	10.8%	32.5%	19.5%
35.	District employees receive annual personnel evaluations.	21.9%	66.6%	7.7%	2.9%	1%
36.	The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	3.1%	18.5%	20.7%	37.7%	20%
37.	Employees who perform below the standard of expectation are counseled appropriately and timely.	4.8%	30.4%	39%	19.8%	6%
38.	The district has a fair and timely grievance process.	3.4%	33.8%	45.6%	12.2%	5%
39.	The district's health insurance package meets my needs.	3.6%	25.1%	6.9%	28.9%	35.4%

D. Community Involvement

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
40.	The district regularly communicates with parents.	8%	54.8%	11.8%	20.8%	4.6%
41.	The local television and radio stations regularly report school news and menus.	4.8%	43%	20%	27.2%	5%
42.	Schools have plenty of volunteers to help student and school programs.	3.1%	18.5%	9.9%	51%	17.5%
43.	District facilities are open for community use.	7%	35.9%	38.6%	14.9%	3.6%

E. Facilities Use and Management

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
44.	The district plans facilities far enough in the future to support enrollment growth.	2.4%	17.8%	21%	39.3%	19.5%
45.	Parents, citizens, students, faculty, staff and the board provide input into facility planning.	3.4%	27.3%	29.7%	29.2%	10.4%
46.	The architect and construction managers are selected objectively and impersonally.	2.2%	13.8%	68.9%	9%	6.1%
47.	The quality of new construction is excellent.	2.4%	18.1%	54.1%	18.1%	7.2%
48.	Schools are clean.	7%	45.9%	5.5%	31%	10.6%

49.	Buildings are properly maintained in a timely manner.	5.1%	32.5%	5.3%	39.5%	17.6%
50.	Repairs are made in a timely manner.	3.8%	22.5%	6.2%	41.2%	26.1%
51.	Emergency maintenance is handled promptly.	4.8%	38.3%	16.6%	25.8%	14.5%

F. Financial Management

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
52.	Site-based budgeting is used effectively to extend the involvement of principals and teachers.	6%	40%	22.3%	24.5%	7.2%
53.	Campus administrators are well-trained in fiscal management techniques.	7.2%	35.9%	31.1%	17.6%	8.2%
54.	Financial reports are allocated fairly and equitably at my school.	6.7%	35.7%	19.7%	26.4%	11.5%

G. Purchasing and Warehousing

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
55.	Purchasing gets me what I need when I need it.	2.7%	29.3%	18.5%	36.6%	12.9%
56.	Purchasing acquires the highest quality materials and equipment at the lowest cost.	2.4%	29.3%	37%	18.9%	12.3%
57.	Purchasing processes are not cumbersome for the requestor.	3.1%	31.7%	29.5%	25.9%	9.7%

58.	Vendors are selected competitively.	2.7%	23.9%	62.1%	6.8%	4.6%
59.	The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	3.6%	45.3%	15.7%	23.7%	11.6%
60.	Students are issued textbooks in a timely manner.	7.2%	46.3%	9.8%	24%	12.7%
61.	Textbooks are in good shape.	7.4%	62.8%	8.9%	14.1%	6.7%
62.	The school library meets students' needs for books and other resources.	14.1%	53.5%	8.9%	13.9%	9.6%

H. Food Services

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
63.	The cafeteria's food looks and tastes good.	2.6%	22.6%	19%	35.7%	20%
64.	Food is served warm.	4.8%	53.3%	22.7%	12.7%	6.5%
65.	Students eat lunch at the appropriate time of day.	7.4%	69.7%	7.2%	12.2%	3.6%
66.	Students wait in food lines no longer than 10 minutes	6.7%	46.9%	16%	23.2%	7.2%
67.	Discipline and order are maintained in the school cafeteria.	7.4%	48.9%	10.6%	21.3%	11.8%
68.	Cafeteria staff is helpful and friendly.	18.6%	54.2%	12.4%	11%	3.8%
69.	Cafeteria facilities are sanitary and neat.	15.8%	61.6%	11.3%	8.2%	3.1%

I. Safety and Security

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
70.	School disturbances are infrequent.	6.8%	47.8%	7.1%	25.4%	12.9%
71.	Gangs are not a problem in this district.	3.3%	14.1%	20.8%	43.2%	18.6%
72.	Drugs are not a problem in this district.	2.2%	12.2%	26.1%	42.8%	16.7%
73.	Vandalism is not a problem in this district.	1.4%	10%	15.8%	49.9%	22.9%
74.	Security personnel have a good working relationship with principals and teachers.	15.1%	60.7%	13.9%	6.5%	3.8%
75.	Security personnel are respected and liked by the students they serve.	13.9%	59.5%	16.8%	6.7%	3.1%
76.	A good working arrangement exists between the local law enforcement and the district.	18.8%	55.5%	20%	4.8%	1%
77.	Students receive fair and equitable discipline for misconduct.	10.8%	36.9%	9.4%	27.1%	15.8%
78.	Safety hazards do not exist on school grounds.	6%	34.2%	18.4%	28.2%	13.2%

J. Computers and Technology

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
79.	Students regularly use computers.	9.6%	35%	5.5%	34.8%	15.1%
80.	Students have regular access to computer equipment and software in the classroom.	7.2%	27.9%	4.1%	39.9%	20.9%

81.	Teachers know how to use computers in the classroom.	8.4%	42.5%	10.7%	29.6%	8.8%
82.	Computers are new enough to be useful for student instruction.	7.2%	32.3%	7.4%	32.8%	20.3%
83.	The district meets students' needs in classes in computer fundamentals.	6%	29.8%	13.1%	31.9%	19.3%
84.	The district meets students' needs in classes in advanced computer skills.	3.6%	17.3%	29.7%	29.7%	19.7%
85.	Teachers and students have easy access to the Internet.	4.8%	16.7%	10.5%	34.5%	33.6%

Appendix E

TEACHER SURVEY RESULTS

C. Narrative Comments - Part 1

The narrative comments below reflect the perceptions and opinions of teacher survey respondents.

- FWISD does not fill positions with the right personnel. For example, some teachers have full bilingual classes, but have not passed any of the Excets and have worked for the district several years. The district signed up these teachers as professional employees until they pass the Excets. What about the teachers that have passed the Excets and still don't have the jobs they were trained for? These teachers have to be trained for other programs. I know these facts first hand.
- Overall, the district does an excellent job, taking into account the social conditions of many of our students, and the lack of good role models in their lives.
- Computers should be available to every student. They need access to current software. Our students who plan to work rather than attend college are being cheated. They do not receive enough education to allow them to move into a good paying job. Secondary teachers are being punished for students that are unable to pass the TAAS. Students that are new to this country are discouraged from an education due to TAAS. Many times students are passed to high school without the necessary skills.
- We need a new superintendent.
- FWISD is one of the best school districts to work for in this state. I am proud to work for FWISD. There were no questions regarding professional organizations; esp. UEA; TSTA, etc.
- In my opinion, the FWISD spends money unwisely- too many "top" and mid-level administrators are being paid excessively and not earning what they are being paid because job descriptions overlap. In addition, our school board, on the recommendation of our superintendent, spent millions on computer labs that were not research-based as effective, has given tax breaks to companies that have donated cell phones we've never gotten, tax breaks to corporations for donating out-of-date computers. Overall, we are, in my opinion, spending too little on teachers, students and instruction and too much on people planning programs.
- As a teacher assistant, I think all teachers do a great job in our district and rarely get recognition for it. Gangs are not as bad as they used to be, but drugs and violence are still pretty much a

major problem. Kids have a negative attitude (high school) towards education and lack of respect for teachers and assistants.

- I think FWISD has too many administrators. The teams (instructional) are not needed. The teachers of those teams need to be back in the classrooms. Another problem is that we have no communication between special education teachers and Dr. James. We are isolated from special education administrators. Our principals don't have answers to special education teachers nor do our campus supervisors. Also, the school budget does not include any money for special education, because they say we are to get money from the department. Please look at the site board budgets. Lastly, the BIC classes are not working all over our district.
- We need more computers and more computer training. I have two computers in my classroom that will not even turn on. The only computer that works is my personal computer that I paid for and brought to school.
- Teachers are always given the opportunity to suggest, recommend, etc. But that appears to be all it is. Teachers spend too much time preparing reports, surveys and plans that do not improve or add to instruction. Most teachers WANT TO TEACH.
- My campus has existed for 2 years. When we opened, we hardly had a budget to work with because the school we separated from would not share funds with us (funds that technically would have been used for sixth grade if we were still a part of their school). There has to be a better way to get the sixth grade centers some of the money that the seventh and eighth grade campuses are keeping.
- We feel that we are doing much better educationally than the TAAS rating system says. The TAAS rating system is based on the premise that "you are no better than your worst student." No other business or institution in America is rated that way. Is your office no better than your most inept employee? Is a church no better than its worst sinner?
- I appreciate you asking my opinion on these matters. The district is too top-heavy. We have too many people working at the administration building and it just keeps growing. The taken the best teachers out of the classroom. He has offered them more money and they couldn't resist. The regular classroom teacher is left out regarding pay raises, supplies, etc. because of all our "coordinators" and program supervisors and facilitators. The workshops are ridiculous and total waste of time. If the general public would be exposed and treated to such absurd programs, they would all walk out and the business would have to shut its doors. There are so many areas that need to be addressed. Don't even get me started on TAAS!
- If you are in a school that has been low performing, or has a high percentage of low-income minorities, the school seems to only

focus on TAAS activities. Elective courses are considered fluff and students are regularly pulled from these classes, (3 days a week) to focus on reading, writing and math tutoring. Also, reading skills appear to be taught only for the value of passing TAAS so that many students can not infer, and are not given the opportunity to read a book. They only read paragraphs and answer questions.

- Fort Worth ISD seems to have a philosophy of millions for administration and pennies for education.
- The administration is overstaffed and overpaid! There are too many layers of administration we must go through to get to anyone who can actually do things. The school board is regularly given a "sugar-coated" version of what is actually going on in the schools. There are no computers! No equity regarding facilities and supplies.
- I think the counseling positions are neglected and counselors are doing other things than what is specified in their job description.
- Purchasing is idiotic. Why not allow purchases of school supplies that are ALWAYS on SALE in the summer prior to the first day of school? Why not go off the "Approved Vendor List" to purchase items on sale (TV/VCR) instead of paying \$120 more to approved vendors? It's like the government paying \$2,000 for a special wrench when a \$12 one works as good or better. Purchasing is a poor steward of the district's money!
- Teachers who are extremely effective hard working, put in extreme overtime and are creative and superior are treated exactly the same as incompetent, last and totally ineffective teachers. Good teachers who choose to work in areas where more children are disadvantaged are truly looked down on and spoken to and of by the administration, especially area leaders. The district is very top-heavy in administration.
- I have absolutely no budget money allocated to me as a science teacher at my school - not one cent. I have had [things stolen] from my classroom. I purchase all the school supplies that I need with my own money. The school is dirty. I painted the walls in my classroom with my own paint. I cannot lock up any of my school supplies in my room because there are no keys to lock the locks. The quality of the health care insurance is a joke.
- Principals are poorly matched with the experience they bring to the job. For example, high school experienced educators being placed in a middle school, they just don't understand the students or teachers and try to make a high school out of the middle school. Students are pushed too fast academically. Administrators that work in the central office are usually failed principals who haven't worked in a classroom in 20 years. There is also a lack of male principals in middle schools.

- Discipline is a big problem in our school. Teachers do not feel that our campus administration is backing us up when we have classroom disruptions. They want us to go through a series of slips with students and a lot of paperwork before sending the student to the office. That takes away a lot of time from teaching and puts us in the position of police officers.
- My comments may seem biased, but I am at a school that is experiencing difficulty, unrest (ONGOING) with administration in the building.
- Up until I went to a five-day "Technology Boot Camp" and received a Dell computer for my classroom, all four pre-K classes and four kindergarten classes (eight rooms) shared one computer. I gave up five days of summer vacation to provide my classroom a computer. I'm glad I did it, but why isn't a computer in every classroom in the district?
- Fort Worth does not seem to respect the opinion or job of the teacher. We have had four or five different reading curricula in the last six years, and the teachers haven't been consulted that I know of.
- I am very pleased that FWISD has made computer technology a priority. At my high school, we have been replacing computers at a rapid pace- we just added another new lab! The business dept has been completely upgraded; the writing lab is also new. Our math lab is relatively new as well. We constantly offer after-school workshops for the teachers to update their computer skills. I am most exceedingly happy teaching where I am and what I teach. I wouldn't dream of leaving!
- Teacher manuals were replaced with new ones that still contained errors. And then, after school started, we received yet another teacher manual replacement (five total) that wasn't even the Texas edition with TEKS and TAAS objectives. Will someone stop the madness and the wasted spending? Who is paying for all of this?
- Discipline is out of control on the elementary level at FWISD.
- I feel that FWISD is a good district that has some areas that need a lot of improvement and some areas that need very little improvement. It is hard for me to answer some of these questions due to the fact that I haven't seen a wide variety of schools in the district.
- The district is meeting the needs of all teachers and students. Some students don't choose to cooperate and participate in academic work. They would rather create problems for themselves and others. Our district is doing a great job.
- The purpose of the school system should be to provide quality education for all students. The administration bureaucracy hinders rather than helps achieve this goal! The district spends too much money to administer programs that are marginally effective.

- The district needs to appreciate their assistants that have been in the district 10/20 or more years. Give incentives for them as well as for the new teachers or teachers just signing to work for the district. Experience should count for something. No one gives the assistants credit for the hard work they also do, nor are they paid overall for what they are worth. They too play an important part in the classroom in discipline, assistance and management. They are teachers too.
- I think FWISD is one of the best school districts in the country. I think that, on a whole, FWISD is doing a great job. I love my job and my students and my whole school (co-workers)! Anyway, I know that it will only get better and better! The next few years will only be better!
- I really think the classroom maximums need to be lowered to around 20 through at least fifth grade. The larger classes seem to lead to more disruptive behavior than the smaller ones.
- I believe so strongly in the Fort Worth ISD that my son goes to school there (and loves it, by the way). They have offered him opportunities that he would have never received in other districts or in a private school. He takes algebra as a seventh-grader. He can take Latin in middle school and has access to an advanced research class called SOAR- all in a non-magnet school! Your public dollars are well spent in the Fort Worth ISD.
- Fort Worth ISD is focusing too much in becoming recognized as the best district in the nation by teaching exclusively to pass the TAAS test. The traditional goal of educating genuinely all children to become rounded, balanced human beings has been set aside. This change has drastically affected our quality of life in our schools, where we feel helplessly corralled to perform or put into effect impersonal, abstract curriculum, without the ability of speaking up our points of view.
- Since I was randomly selected and not a teacher, I decided to respond. My experience as an assistant has been most rewarding. The teacher and principal have always shown respect for my position. They have adequately trained me for the position I have been asked to serve in. In my 15 years of service in the FWISD, I've seen the support begin with our superintendent, administration, school board, teachers and staff not the least maintenance. This opens a learning environment for our children and their studies.
- Our school has two campus monitors. If one is ill or absent we only have one. Our ISS and OCD are "fun" for the kids. A kid knows he/she will be given chance after chance. The discipline is a huge problem and woo-hoo, a kid is suspended and comes back knowing they had a free day and no other punishment. We have classes of 35-50 or 60 and not enough room or desks. Now they are raising our insurance.

- Too much emphasis on the TAAS test. Too many after-school and Saturday meetings that are non-practical to effective instruction in the classroom. Central administrators are out of touch with the realities in the campuses and classrooms. Rarely do they visit classrooms. Recent article in the local newspaper about a former central admin, who has been hired as a consultant for over \$60,000.00 to effectively do nothing, has hurt the FWISD image. Please look into this.
- I enjoy working in FWISD and I'm proud that my child attends an excellent FWISD school. I am currently paid a fair wage, but while the salary scale emphasizes being competitive for ACW teachers, it offers little reward for seniority.
- First- we need updated computer labs and more computers in the libraries for student use. Second- every teacher should have a computer in his/her classroom to use instructional ancillaries that come with textbooks effectively- and to use grading program. Third- more intervention/ motivational/ counseling programs for at-risk students. Fourth - more show of appreciation for teachers of all levels from our superintendent. Motivation/ positive reinforcement would be nice. It would be nice if teachers could receive a copy of the results of this survey.
- Teachers don't always get strong backing from our assistant principals. We do our part to have detentions, call parents and use assertive discipline, but some of the administrators are very lax when an infraction is sent to them. We are limited excessively in the amount of paper we can use. Students won't bring textbooks to class- the solution is to provide handouts. The school administration is not supportive in regard to paper.
- The science classes are very large (sometimes with 40 students enrolled). Of these, several will be mainstreamed special education students. Therefore, ICP and Chemistry teacher will not take the students into "wet" labs because of the liability issues involved. State TEKS mandate 40 percent lab time, but this is an impossibility. The district's rules for providing teachers to a school keeps my principal from hiring more science teachers. Therefore our morale on this issue is low.
- The answers on this survey mainly apply to my elementary school on the southeast side. We are very technology starved. The cafeteria is awful and the staff (cafeteria) are very often mean to my students.
- One man runs the show. The board and the superintendent bow to him. He has practically succeeded in dismantling the magnet program. The gifted children in the district have no chance. Why do we have to neglect the group of our children with the greatest potential, the true leaders of our country? I personally am going to seek early retirement to seek more lucrative employment in the

business world. Many others will do the same. **POLITICS IS KILLING THE EDUCATIONAL PERFORMANCE OF FWISD.**

- Administrators are inconsistent and have no backbone. If a parent raises his/her head, administrators melt. The school system is not serious about attendance, it allows unlimited excused absences. Students also miss too many classes because of extracurricular activities. The school district should not give a minimum grade of 50 if the student doesn't earn it.
- The students at some schools are surrounded by construction. AC filters are not changed regularly (not even once per 2 months). Students in some classes do not yet have textbooks issued to them. Some teachers do not have teacher's textbooks and ancillary materials. Budget are not in place in many schools. Science gets one of the highest amounts of funding other academics are considered not so significant. Athletics has a higher budget. Start up materials are missing. Average teacher pays \$450 - \$1000 out of our pocket per year for supplies. District reimburses \$150. Teachers are forced to resign to benefit district and rehired. This saves the district full years TRS and salary scale compensation for any one year.
- In K-2 the Reading Initiative has been a big plus. Our kids are reading but very little "extra" for the children (no art classes, computer, music or p.e.). K-2 get out at 2:45 due to lack of buses, therefore not enough time for extra classes. These are to be incorporated into instruction, but few teachers are specialized in these areas and may not have time to accomplish. 8:30-2:45 is barely enough time for reading, writing and math, let alone science, soc. and extras.
- I don't understand why members of the administration building have to travel all the way to Spain, have plane tickets, hotel rooms (suites for each) dinners, meals paid to go and interview people from Spain. It's ridiculous! We have capable people in our own city who can perform the types of jobs without spending so much from our district's budget.
- Fort Worth Independent School District has come a long way in improving it's performance and keeping focus on what is best for the child. However, I express concern over the emphasis on TAAS. In addition, let's keep good teachers where they are needed instead of losing them to a company where the pay and benefits are a lot better.
- Teachers who have proven loyalty to the district are not rewarded!! New teachers with no experience make more than some tenured teachers. Most new teachers grab the signing bonuses, enjoy the lavish beginning teacher's salary and LEAVE THE DISTRICT! There seems to be no JUSTICE! Our K is never considered for curriculum guidelines- it's always watered down from

kindergarten! The district tries to train teachers in new programs two days before school starts! That's absurd! Most of us feel very ill prepared at the beginning of school. We're sent across town for professional development, only to be served the same old soup over and over again. There is never enough preparation time for teachers to get classrooms ready.

- When a teacher needs to get any form to the central administration office we are told "hand deliver it because it will get lost if you use the school mail." This is not very efficient for the teachers. We often get information about meeting a deadline very close or the day before they need something! Central administration not only does this to teachers but more often to principals.
- While computers are available and somewhat up to date there is a severe problem due to lack of teachers access to able technical assistance. Teachers may attend computer workshops but it is district policy of denying any real help. Instead a tired overworked full time teacher is paid a small stipend to on paper say that we have a tech person for help- it basically means no help and valuable computer equipment is being squandered. As a teacher, I spend much volunteer time trying to get help. If I or any teacher at my campus gets help it is from volunteer help of family members yet our evaluation rate us on use of technology. Is this a wise use of taxpayer's money? I dearly want to and am able to make use of my computers, but can't get a needed cable and no one can get me accelerated reader to work on my new iMac because of lack of knowledge!
- Let's get a better insurance. I would rather have better insurance than just a raise. I pay over \$300 a month. Every time we get a "so called" raise our insurance goes up. This is terrible. If we have to do grades every 6 weeks instead of 9 we need a computer in our room to put them on and not have to go to another room. We end up staying late at school. Get a grading system that is compatible to our old computers or get us all new computers.
- Special education programs are severely lacking. For example, I have a Tandy Sensation and Apple IIC computer with a dot matrix printer! Also teachers and especially principals are uneducated about special education. They know little or nothing about LRE or IEPs. Teachers do not want or know how to modify curriculum and adapt instruction. Everything is geared toward the general education or gifted education population.
- I am proud to work for the FWISD. I have seen many improvements since I started teaching here in 1992. More emphasis should be put on helping high-risk, low-performing student programs. More computers for all students are needed. Thanks to Mr. Tocco, you changed everything.

- The Fort Worth educational performance is excellent and I have no complaints.
- Currently four special education classes share two classrooms at my school. This arrangement is not conducive to student learning as two teachers (teaching different subjects) compete for the students' attention. Our school looks tired and worn. A new custodian has improved cleanliness but that has been a problem in the past. Our school needs computers! We would love the Internet in our classrooms! On a positive note- we have a committed, caring faculty. We have an after-school tutoring program in place to raise TAAS scores. Our administrators listen. Discipline is good. Learning is happening!
- I am frequently in meetings that take over two hours and rarely accomplish anything. I have not had a planning period yet due to constant meetings. I am at school over twelve hours each day and some weekends and I still can't get what I need to do completed (meetings again). Student expectations are hard to reach when the level is higher than the time of year (low to medium at beginning, not May expectations when it is only September). Students spend too much time teaching themselves (usually learning it wrong) and hardly any time being taught. Students are being taught two grade levels in one classroom, which requires double work for the teacher without the teacher having adequate time to make plans. Classrooms do not have necessary manipulatives in which to teach elementary students the basic skills. New teachers (and new to district) are regularly signed up for additional workshops without first consulting teacher to determine if any previous plans were made (this includes other workshops and personal time). Students and teachers do not have adequate restroom facilities available (mine are approximately 50 feet away from my door, I am in a portable building). Teacher morale is very low which adversely affects student achievement. Thank you for listening.
- I believe our school district has made many good decisions and changes for the students in our city. But there are many things that could be improved such as class size. Principals are forced to lie about class size or to have "bridge" classes, neither of which are beneficial to students. In first grade the week report cards were due there were also 3 district-wide tests and also a computer scan sheet for each child regarding our reading program. This is too much testing for students and too much cumulative data for teachers in such a short period of time. Many test results are not even seen by teachers or parents. Parents still have not seen results from the many tests given at the end of the last school year.
- I have not been employed long enough to comment at a more enlightened level.

- Computers and new technology need to be replaced at least every 3 years. All computer labs need drops for each computer to have access to the Internet. Every teacher needs their own classroom. Many teachers have to "float" from one classroom to another.
- Fort Worth is a good urban district. My main complaint is technology - I don't have a computer that has software. I only have accelerated reader. I have asked over a year - still no software. My computer is so old it can't even accommodate the grading software that I need. Also- restrooms have no hot water for teachers and aren't very clean- very old. We need an art and music program, also.
- I really enjoy my job; however, inefficiencies in central administration and weak building administration make my job difficult.
- This is my fifteenth year with FWISD. I have received excellent staff development on an annual continuing basis that keeps me on the cutting edge, with new and significant strategies for enhancing my teaching. I have been genuinely impressed with the opportunities for professional success while a teacher with FWISD.
- Less political influence. Old fashion administration. Not supportive of personnel.
- My largest single concern is teacher salaries. We seem to hire a lot of uncertified (even un-degreed) teachers at my school (many as long term subs). We put our certified teachers through a rigorous certification process (and rightly so), but when we run short of those, we simply hire other, uncertified people at a lower cost. This seems to become an incentive to hire more uncertified people. I'd love to see salaries go way up (for certified teachers)!
- Temporary safety hazards caused by construction on campus. Not nearly enough computers available for student enrollment. Overall, FWISD does a commendable job of meeting the needs of the people it serves.
- I am an employee of FWISD, and I teach in a PPCD class. I strongly feel that all PPCD teachers and aides work just as hard as do Linc and Bic teachers and aides, but yet the district feels that we don't deserve the same stipend as do the Linc and Bic teachers and aides. I feel that this is very unfair, also this is the second time that PPCD has been overlooked.
- There is too much class time wasted on testing and practicing for tests.
- 1.) Large corporations found out a long time ago that the bureaucracies and inefficiencies of huge corporations was unprofitable. They responded by breaking into smaller companies that could respond to their customers needs. Perhaps the same is

true for the large districts. 2.) Paying the superintendent a huge salary is ridiculous. More than the governor of the state?

- FWISD and its superintendent treat teachers as if they were the enemy. Teachers know it, feel it, and are leaving in droves. Every year we have more teachers who are unqualified to teach- everything from no college degree to no educational education. Until teachers are respected in attitude as well as financially, a shortage of qualified teachers will continue to exist and grow here and everywhere. At least in the smaller districts teachers continue to be respected. In Fort Worth they are neither.
- I feel that the emphasis on state wide testing has caused our school district to become a TAAS focused district. While I agree with the standardized testing, its emphasis on reading and math has practically eliminated most other subjects really being taught. Students spend many days in tutoring. In my opinion, if so many students need special tutoring, something is wrong somewhere.
- I have considered leaving the district many times solely based on poor pay. I will say that Fort Worth ISD has done an outstanding job increasing the beginning teachers salary. However, I have taught 9 years and barely make more than \$75 dollars more a month than a beginning teacher. I consider this a great insult. The facts state that most new teachers leave the profession within 5 years. The #1 reason being money and #2 discipline. Until our salaries are more competitive and discipline becomes more controlled the teacher shortage will continue to increase.
- The voices of selected individuals are listened to more strongly than the voices of the real people of the district. Putting all of G/T students in one classroom (per grade level) leaves the other classes without student leadership and packs the discipline problems into fewer classrooms so they can not be spread out, thus harder to teach. Information on student enrollment card is frequently out of date or deliberately falsified by parents to try to hide from school officials. On computers- the needs of the elementary schools are the last to be filled. Sub teachers are often used as long term teachers - most teachers who are eventually hired are good at what they do. A statewide plan is needed to set up a level of minimum standards for health insurance coverage. Input on school construction is gathered in open forums geared toward parents. Teachers are seldom included in the final plans even though they are sometimes asked what they think to make it look good. The opinion of teachers should be given the strongest amount of impact as we are the ones who will have to deal with what is built/ remodeled long after the builders have moved on to other projects. Our maintenance workers are more and more frequently being called on to do "contractors work/ new construction" work instead of being available for repairs or updates. My campus has

outstanding work order requests (that have been sent to the maintenance department) that are more than a year old. I have been told that many of the effective cleaning products have been removed from the warehouse because they are "too expensive." Because school budgets are approved on Aug 31st each year the warehouse is frequently out of stock on some items during the first six weeks of the year when they are needed the most. Although the district has a fairly good size list of vendors, certain vendors are "pushed" harder than others even though the same item can be found elsewhere cheaper. Heavy on starches and some combinations of foods appear to be incompatible.

Appendix E

TEACHER SURVEY RESULTS

D. Narrative Comments - Part 2

- Phonics and physical motion for reading instruction is a dynamic duo to use when educating young children. This is Open Court's best technique for imparting skills to blend and read three letter words. Letter People used for activities works very well also. Language for Learning is useful for ESL instruction.
- I wish there was a better way of monitoring if the principal of a school is doing his/her job and not impeding the educational process by his/her lack of organization and discipline.
- Gangs, drugs, vandalism are problems everywhere. They are well controlled in FWISD.
- Parents need to be held accountable and students should be made to take responsibility with strict reinforcement from administrators in FWISD. Lack of parental support, lack of teachers choices in disciplining students... they are basically powerless, and so students don't learn to read and write. The classroom environment is noisy and students disrupt instructional time. Teachers should be able to retain very weak students so that the next year's teacher can reach them on grade level.
- No one asks the teachers input or thoughts about anything ever in meetings!
- The ISD is burning the love of teaching. As a primary teacher, this district expects 7:30 to 5:30, then take it home. This job consumes you, leaves you exhausted, gives you very little support and constantly interrupts good quality teaching with bench mark testing, TPRI testing, chapter testing, etc. P.S. I believe in standardized testing! But, this district only teaches TAAS! Children deserve an education! Bring back the Iowa Basic Skills. Maybe school districts would teach children rather than a test. It's time to hold students and parents accountable! Teachers do a terrific job!
- I believe the Fort Worth ISD has improved a lot in the past 10 years. I do feel, however, the K-2 students are at a disadvantage because the teachers have to teach their own art and PE. Just this year we got a music teacher who serves grades 1-5. The first grade classes have music once a week for 30 minutes. K-2nd grade teachers have their planning at the end of the day, so the only time away from their students is their 30 minutes at lunch. It makes for a very long, hectic day. Thanks for taking this survey. I'm sure education in Fort Worth will improve as a result of your efforts!

- I am fairly new to the district and am still "learning the ropes." I feel the district has been excellent to me. I have had no major problems. The students we deal with are difficult because of their home lives. Our school is very caring and supporting of the community- and I feel this district is increasingly riding to the top! Thank you.
- TAAS - "Drill and kill" takes all the fun out of learning. New school administrators (principals) are out of control- adversarial, non supportive and rude. They have learned it by example by district administrators. We have very few principals worth their job in this district. Large districts do not meet the needs of all students in the district. Too many and varied.
- This district is not the warm, caring child-centered district that it once was. We have been encouraged to pass our students with no less than 20 percent failure rate. I have lowered my standards. I believe that although we are a large urban district, we should be able to maintain discipline while making learning enjoyable. I think the reason Fort Worth ISD has a teacher shortage is because administration does not support us. I would love to have several computers in my classroom. This is rambling, but I am frustrated and it shows.
- New teachers need much more administrative and instructional support. Team support in the areas of discipline and strategies to use with an inner-city population. Testing schedules need to be looked at. We lost 5 class days by giving the Stanford 9 and 3 benchmarks in a two week period.
- In some instances, the students are given too many tests. Teachers cannot teach because of useless time administering tests. The teachers are expected to perform miracles with too many students in a class and one third to two thirds are disruptive. The "0" tolerance disruption policy is just a slogan, not realistic. More programs should be designed for students who are not college-bound. The district should have more trades schools available for students period 9. Some of the administrators have good morale and some do not.
- No TE for teachers at new elementary schools - sharing SS student books and 2 sets of TE for 5 classrooms. Poor air condition. No computers. Lack of appropriate furniture. No math materials (manipulatives). Student lunch cards are lost and not accounted for by cafeteria staff.
- Some 5 classrooms had no lights for 7 weeks! Air conditioning does not work throughout building- upstairs hot main level cold.
- Middle school sports are pitiful. Seventh grade athletics have been reinstated but the personnel who have been hired aren't competent. Usually they are just teachers who are coerced to coach and who don't have skills or motivation. Our high school teams can't

compete, especially our 5-A school. We feel little support from administration. Zero tolerance needs a new evaluation. The district has gone overboard and in some instances the punishments are ridiculous for "crimes" that are questionable to say the least.

- Coming from another district that had a fair number of resources (computers/ curriculum instruction) it is ridiculous the lack of computer accessibility students have. I do not have a computer in my room nor do my students have accessibility to one. We are compromising the future of my classroom and the children who lack easy access to computers. Students in poverty already have limited access to technology. Further, the lack of technology accessibility for students in the classrooms and labs (technology) puts more barriers in front of students. If the district wants to be on the cutting edge of education, it should thoughtfully pursue and maintain partnerships with the business community and/or give training to administration in grant proposals. Forging alliances with businesses will meet corporate giving standards on their side and open doors to equitable resources for teachers and students.
- Our primary grades are very often shoved to the background because of TAAS. We need more help in the classroom and on the playground and in the cafeteria. Stronger discipline measures should be in place in the lower grades with more value placed in the teacher's professional judgment as to accountability of students and parents. If we continue to start school in August then age cut off to enter school should be at least by August 1st or ideally by July 1st. The Texas Legislature needs to consider making Kindergarten a mandatory grade so that children who have not mastered basic concepts to succeed in school could be given another year in kindergarten to master this foundation for later education. "A house built on a faulty foundation will fall and crumble."
- The #1 area of improvement for FWISD is diversity training for all aspects in the school / community family. Small gains have come from small efforts. I realize that people can not be forced to get along better, however the more it is stressed at all levels the better schools, communities and eventually homes will be. The backdoor approach is effective.
- This is what I see in FWISD schools: There is a shortage with teachers and the district is getting men and women that has a degree in something else, not education, and they come in knowing nothing at all about a classroom or a student behavior; they are lost. But, on the other hand you have a teacher assistant that has been in the classroom for 10 years or more, and has learned a lot about classroom management and what is expected of students and how to teach. I think that the FWISD needs to take a look at the experienced teacher assistants and give them a chance in the

classroom. Instead of someone that has no idea. Some teacher assistants have no college hours and would love to be a teacher, but have not been given the chance. There are a lot of good assistants out there, hard workers, some better than teachers. This is something I wanted to share. Thank you.

- There are many notable things to say about FWISD, however there is still so much to be done. A large urban district attempting to serve the many diverse needs of all its students and measuring that process by testing, testing and more testing. In the meantime, there is a severe shortage of teachers and others that are not teaching in the subject of their expertise for which they were trained. A lot is expected from both teachers and students in a very short time. Many teachers are frustrated and overwhelmed, in other words FWISD is very much still under construction!
- During benchmark and TAAS testing, it is very difficult to obtain off-level testing materials for special education students. Time consuming tasks such as bubbling additional answer documents, are left until the last minute. We operate in the "11th hour" mode the entire time. Also, seldom if ever, do we receive the results of the tests and student performance. This is highly unfair to our students who exert effort and receive minimal, inadequate feedback.
- The district is almost totally TAAS driven. The teacher in-service has awful, with little choice and little value especially for experienced teachers. Most, no all, of the most able administrators have left. It is Tocco's way or the highway. The use of "teachers on special assignment" has bloated the administration. The requirements placed on the classroom teacher, as far as paperwork, makes it difficult to keep up and find time to teach.
- As a teacher, I do not have the resources and materials I need to teach effectively. Many of my students do not have desks to sit in. I have two to three students for every textbook. We are into the second six weeks, and my students have not been able to check out a book at the library. We have no computers at all in the school. It is very hard to do my job given these circumstances. Also, this is my third school to be in this year because I was surplused and I am the fourth teacher this particular class has had. FWISD did not effectively place teachers in the right schools at the beginning of the year. The result of this is that teachers have not had security and stability in their job. More importantly, the students have no stability and weeks of educational opportunity have been wasted. They need to treat teachers more like professionals, train them for the position and let them do their job and teach. If a mistake was made by FWISD in placing teachers in the right grade and school, they should correct that mistake at the end of the year when they can prepare and retrain the teacher for the new position. Making

this change in the middle of the year is detrimental to both teacher and student. Thank you for the opportunity to share my concerns!

- I feel that middle schools are given the "hand me - downs" from their feeder high school. Many and most of our equipment is old and outdated. The district needs to put forth more effort and time into the middle schools and not put all the focus on the high schools. If students are not educated at the lower levels, serious problems are going to break out when they try to graduate high school.
- We need more staffing for SPIED (teachers, behaviorist and instructor assistants); the current ratios don't work.
- Corrective reading program is not an effective program in campuses that have Open Court 2000. Open Court 2000 has everything and more than what Corrective Reading can offer without the hassles of students being moved from one classroom to another. This activity of students going to the designated reading level is inefficient teaching time. Besides, in some or many campuses last year, every student in campus was taking Corrective Reading even though it was evident that the student was reading over and above his/her level. This was a waste of time.
- Some of the Agrees that I checked are actually just so-so. Discipline is at an all time low. There are no consequences for misbehavior. The children, on the whole, have no respect for authority. This is a real problem for teachers as well as the security personnel.
- AP classes are packed with no expectations of meeting College Board objectives. Administration is hostile referring to teachers as "auditable resources." Management by threats and tantrums. Absenteeism is high. Books sit in warehouse while teachers photocopy their own. My classes are interrupted on average ten times a day. Communication is primitive. I have to do any work involving a computer at home. There are teachers weeping in the hallway on a regular basis. A NIGHTMARE! Thanks for asking!
- We need a principal who knows how to deal with people! We need up-to-date computers (and more than 1) printer, software. Classrooms need to be equipped with basic supplies: manipulatives, readers, paint, paper. Teachers should be allowed to purchase supplies via a district warehouse to lessen cost. Too much money is spent from my personal pocket. Teachers really support the education system twice! Taxes and supplies.
- Doing well, in light of the many problems facing the student population.
- I feel that education is not the main priority of this district, test scores are the priority. I feel that there are terrible inequalities in our district, it is rarely bias. In times of trouble, teachers are always wrong until proven right. Administration is in conflict with

teachers. There are serious gaps in the materials teachers need to teach. There are serious differences in technology from school to school. It took hours to do first six weeks grades and they are still not correct after having done them over and over three times.

Experience and competence is not rewarded in this district.

Nepotism, racial favoritism, age discrimination and reverse discrimination are in our district. The test scores that our district has received have come at a terribly high cost in teacher morale and turnover. Our environment is unsafe and unhealthy because our constitutional rights are being violated daily. We are wrong until proven right.

- There are so many elementary campuses in FWISD that I'm not sure that my responses are applicable to any other campuses. We definitely have a great discrepancy between facilities and available technology in the elementaries. Our campus has one computer connected to the Internet.
- FWISD is a great place to work. There are some problems, but the district is working hard to improve them (computer). The district is working hard to have all students be successful today and in the future.
- The district is too big. It has lost sight of what teachers and students want and need. Where's the Internet? In-service this year was a waste. Complaints were written but no responses. New teachers confused on procedures. Counselors and librarians are teaching Open Court. Too many due dates demanded by the district (TPRI, 6 week test benchmark, report card, Open Court all in the same week!)
- The building I'm in does not have power outlets working. I cannot use computers in the classroom because of outlet problem. Overhead calculator view screens and computers all need electricity. Only one plug works sometimes. We need a new building.
- The administration seems to be a huge bureaucracy. Whenever I visit the ISD administration building, there seems to be a lot of lollygagging. No one wants to be responsible for making a decision, good or bad.
- Our elementary school is great in so many ways- our teachers are dedicated to teaching and strive for excellence. Our schools lack many of the fine arts that the high schools have- our children do not have music or art classes which make children well rounded. Personally, my classroom does not have a computer and I don't feel qualified to teach art or music. I have taught in smaller school districts that are more personal, where communication between schools is better, and teachers feel like they are a part of the community.

- The educational performance of FWISD Adult English as a second language is not managed in an efficient or effective manner. It is not cost effective academically, instructionally, sound managed or meeting the educational need of the students to their full potential. One teacher teaches all levels in the majority of the schools. The paperwork is tremendously burdensome for the teacher. The paperwork could be done by an aide on a computer instead of the teacher doing the work by hand; therefore instruction suffers. The good teachers leave immediately.
- Excellent leadership from superintendent. Very prominent effort to improve school performance-especially directed towards TAAS. Special education is not student centered and is not as responsive to parents. ARD meetings are pretty bureaucratically controlled. Hopefully, DEC visit from the state will improve things.
- "Temporary" buildings on the campus of a recently built school are so poorly constructed and sited and old that they are "sick" buildings. They are constantly treated with bleach (a cure nearly as bad as the disease) for mold growth underneath. As far as instruction, teachers, as usual are doing the best they can under very difficult conditions. However, all anyone does is teach the TAAS test, because that is all that administration - from top to bottom - insists that they do. We are criminally shortchanging this whole generation of students.
- Our school has mold and mildew problems. Staff have severe allergy problems including pneumonia. Carpets are stained and mildewed. Air system is moldy. Roofs leaks when it rains or is humid. Discipline is a major problem. Students and parents are not held accountable. Students won't do homework or work in class, they want to play. Entertainment has replaced education. Teachers are forced to pad grades in some way to pass students. The TAAS test is the only measure of success. As long as your students perform well, nothing else matters.
- Poor management of facilities leads to costly repairs. Work orders that are turned in are completely ignored, even though they are safety hazards for the students. Cheap construction of "new" buildings leads to repetitive work orders (i.e. roof leaks, shoddy workmanship) no accountability in the work order process. Custodians at school do not properly clean facilities. Floors are not cleaned; mops are filthy and festering with germs. Soap is not provided in student restrooms. Total lack of hygiene concern.
- I think we have too many people in the central office who don't know what's going on or don't COMMUNICATE with others so we get a different answer from each person. Also, we need computer and software and Internet access so that we can get technology in the classroom.

- With the upcoming/predicted principalship shortage, why not extend the "acute" shortage to the principal's position as well?
- Our computers need to be updated and we need more of them. We can only use the Internet in our library. There are no hook-ups in our school.
- In my personal opinion, we are not preparing our children for the future of technology. General education students need to take at least one keyboarding class and basic software application class before they enter high school. Most of the teachers of the district are very knowledgeable and qualified professionals who are helping their students achieve their potential. With the class size and student make-up of a class, teachers are doing the best they can to provide a good learning environment for each student. For example, a teacher may have a class of thirty-five students, which includes special education students (approximately 2-4) gifted and talented (approximately 2-3) and 504 students (approximately 1-2) that require academic or behavior modifications. There is no content mastery for the special education students. Our school needs an additional science teacher for the seventh and eighth grades, because some classes have forty plus students.
- I enjoy teaching in Fort Worth and I believe we have a wonderful school board that always puts the children's needs first. I feel that the success of the students, teachers and school as a whole lies with a good competent principal.
- FWISD has provided me with excellent staff development. I have had an opportunity to be on the cutting edge of developing educational methods and ideas! The school where I am is a beautiful, well-cared-for building. Our administration treats each of us as professionals. My students work hard and reach way beyond the standards set by the state. I arrive at my job with a smile on my face, and at the end of the day, it is bigger.
- Need more effective staff development. Information about summer workshops usually arrives on the day of the workshop or after the workshop has ended. I also feel that recruiting teachers to FWISD isn't a problem because of the pay scale, but we lose our experienced teachers due to pay, and high cost of insurance. Safety: parking and locations of the area should be considered. A lot of the in-services are at the schools with limited parking spaces (elementary campuses).
- The concerns in the questionnaire cannot begin to address the needs of this district. Discipline, followed by a curriculum that is uniform in encompassing all students, would be a giant step in solving a vast majority of issues.
- Time is needed for vertical teaming. Elementary to Middle, Middle to High School students would be prepared for subsequent grades.

Transportation- not drivers, scheduling, drop-off, pick-up - to and from school. Overcrowding.

- Special education needs a common, across-the-board, curriculum and report cards that pertain to that segment of school students. Forty-five minute evaluation process is too stressful for teachers and it doesn't give a realistic picture of a teacher's skills for the year.
- I am leaving the district and the middle school public teaching, because it is not safe for me as a teacher. The administration must help teachers. This is not happening. My teaching is not evaluated. I am judged by personalities who do not make sense. The average, well-behaved student suffers, is not given enough time and is in physical danger. Thank you for asking my opinion.
- The superintendent is not respected by teachers. The bilingual/ESL dept. is not addressing the needs of LEP students- they make big errors in program placement and do not acknowledge the classroom teacher's opinions and needs.
- The morale of teachers in the 15-20 year range of experience is low because of lack of salary wages. Teachers with 0-8 years got the highest dollar increase. 15-20 years got the lowest dollar increase. We feel that we are not appreciated and not wanted. Does our experience and expertise not count?
- The school board members cannot/will not accept anonymous reports. Any teacher who might have a legitimate complaint, and makes the complaint to a board member, is subject to a negative performance review (PDAS); because the instrument can easily be used in a punitive manner against teachers. If any changes are made based on this survey, teachers will pay with their personal time to get trained for the changes.
- Overall, FWISD is a good district, however there is room for improvement. If an old school is used while a new one is built, PLEASE continue to maintain the old building. Many safety hazards have been ignored to save a few dollars!
- Unless you have a relative, a friend of a relative, a friend, a friend of a friend in the administrative positions in Fort Worth Independent School Districts, chances are your work, your contributions, your ideas are not appreciated and you are not treated fairly. If you are not part of that "in crowd" regardless of your qualifications or lack thereof of their relatives and friends you will never be treated fairly!!
- Instructional teams are useless and a waste of money. Administration is top heavy. With teacher shortage, team members would be more useful in the classrooms where needed! Help with technology sadly lacking. Not much support or information with new software, computers, etc. in classroom. Computer repair (for

ones that students use daily) takes at least 1.5 months for a repair person to show up!

- I feel through the efforts of Dr. Tocco we have made great strides, yet we still have a long way to go in making schools in at-risk areas equal. They are not as clean, as well organized nor as safe and we get tired of the inequity of different schools. We feel that we are not as important as your exemplary schools and this is just not fair.
- I appreciate the opportunity to complete this survey. At my campus there are excellent teachers and substandard alternative certification personnel. Please rethink putting someone in the classroom who has no experience or training. Kids suffer from inadequacy of teacher training. My experience applying for employment at FWISD central office was insulting and demeaning. Office staff was arrogant and ineffectual. (After teaching for less than 6 mo., I received an exit survey to complete!) More often than not, central office computers are down, staff needed is out, phone call request are mishandled and in-person requests require lengthy waits and yield incomplete service. My corner of my school is a well-supported, successful environment primarily due to a supportive building administrator and dedicated and effective co-workers in the kindergarten classes, both bilingual and ESL. Why do kindergarten bilingual classes have teacher aides and ESL classes do not? Our insurance benefits have declined, especially for prescription drugs, while the costs increase. In regard to curriculum: we use Open Court reading. Although tedious for the teachers, it has been very effective for the students. We have no social studies or fine art program to speak of. PE begins in 3rd grade! More efforts should be made for GT programs. District in-services vary greatly in value. More emphasis should be given to in-services by practitioners rather than flown-in "gurus" on topics of marginal relevance. I do not see recognition for a job well done. Strong teachers get all the "problem" kids because inadequate teachers can't handle them. I am happy to do my share, but it seems that competence is just given more to do while incompetence gets a lighter load. What's the lesson there? When there is a maintenance problem it takes way too long for district personnel to respond. Often multiple calls have to be made before action is taken. Thanks again for the opportunity to say what I think.
- I appreciate that the survey is being conducted. Many of the questions need more than a "check". I have very strong opinions about the misuse of tax \$ for construction. The private sector would go broke if business were so handled. I also cringe at the tolerance of unqualified and undisciplined teachers. However, my greatest concern is the # of students whose needs are not being

met: ESL, at risk, special ed. It is a travesty, and the manipulation of statistics complicates the matter.

- Fort Worth ISD is moving in the right direction with educating our students. However, too much testing is overrated, and the children, as well as parents and teachers, are becoming more burnt out!
- We need new computers and a better state insurance plan and not so costly.
- FWISD is a good district to work for. As with any large organization, some things take longer than one would like. However, I would rate FWISD as one of our areas top districts.
- Too much TAAS benchmarking and testing in the 8th grade. In one week period- Stanford 9 and three days of TAAS benchmark. The following week- PSAT... severely cuts into instruction time.
- The priority of the district is TAAS, and all else is secondary. All students are required to complete same programs regardless of needs: corrective reading; math curriculum. 100 percent of my students have passed TAAS last 3 years. Still, must complete same old TAAS curriculum- no incentives for me. Last principal was horrible- screwed up and moved up- she was promoted. She placed warm bodies in positions and had teachers teach outside of their degreed areas. Asian-American math teacher was told to teach reading. She left. Art teacher was told to teach the lowest readers in the building. She left. Set up a computer lab and refused to staff it with quality teachers. Lab got trashed by part-time aide. Lab was torn down before next principal could see it.
- To be as large a district as FWISD is, it is tragic that the elementary schools in certain areas have little or no technology in the classrooms!

Appendix E

TEACHER SURVEY RESULTS

E. Narrative Comments - Part 3

- The education in the district is totally TAAS goaled, we teach only to the minority group that will keep us off the hit list.
- Supplies and equipment to teach is a problem. Fair and equitable discipline is not found in the high school that I teach in. Current administration is much more lax than former administration. School is getting out of control. Maintenance reeks!
- Class size should be limited to 25 students per teacher. Students with behavior problems should be allowed to attend an alternative school a whole 9 months. A student removed from a school should not be allowed to return that same year. Classrooms need to be equipped with more computers, better furniture.
- As an alternative school teacher, the district makes sure the students and teachers get the training and equipment needed. I'm proud to be a teacher in the district that requires more security, better contact with parents, stronger leadership and closed campuses.
- Give more hands-on experience in Art, Music, PE and Science so a child would be able to express their self.
- The Reading Initiative has helped me to improve test scores dramatically. Our math scores have continued to rise after the Mathematics Specialist Program began. Furthermore, the Elementary Schools Initiative has helped 3 schools out of 8 to achieve an exemplary or recognized status. Finally, the Advanced Academic Services that are available challenge students to achieve at high levels.
- Concerning purchasing and warehousing - every time I have ordered supplies from the warehouse they are out of that item - no effort is made to fill the order at a later date. My opinion is that FWISD has declined over the last 15 years even though I am in a "desirable" school. I teach kindergarten- it's so academic there is no time to teach social skills that the parents fail to teach before they get to school. Also, everything is so geared toward the TAAS test that the needs of the early childhood are ignored. This is the foundation on which all future learning is built. We test these little ones so much that other activities are left out that could benefit the child.
- Computers at my school are so old they can not even be repaired. Repair personnel say that they are not repairable. We are not connected to the Internet. Our computers are too old. District wastes thousands of dollars buying equipment from high price

vendors. Many of the same items can be purchased much cheaper from other places.

- I commend you for trying to enlist the help of the people out in the school instead of the people with their heads in the clouds.
- My biggest complaint is the lack of respect by the general student body for authority. Teachers and no longer principals have any power to handle students. Profanity is common in the halls and there is no fear of any punishment for such attitudes or actions. Central administration seems to delight in hindering our principal actions to make students tow the line. The only people who have rights are the students. Until education is a privilege and not a requirement, the trend will continue.
- Classroom interruptions are too frequent. Most teachers do not have a computer in the classroom. Access to a phone to call parents is difficult. Repairs to building take months to complete. Coaches get preferential treatment at the expense of the instructional delivery to students. Supplies are not ordered until after school, begins and take weeks/months to ship.
- The schools need a computer lab so that every student can have access to the computer. Teachers should have some input before new programs are adopted, because we are the ones that are in the classroom with the students everyday. There should be at least 5 computers within each classroom that are connected to the Internet.
- The district community partners and PTAs have spent million of dollars on computers. However, they have two technicians to cover repairs at building level. I have had simple problems to repair in my rooms for 3 years. These problems keep my computer from running its best. Most computers sent in for repair are thrown away because they cannot be fixed. The district needs a contract with a computer company to supply computers for the district and do maintenance. Why waste all of this money when the district needs money to manage the problem?
- Everyone in the district is working very hard toward one goal of achievement for every student. It just seems that our best efforts are never good enough. Good TAAS results in my school have been rewarded by quadrupled paperwork for the teachers and threats for lower scores on PDAS for every imaginable reason. I have always considered myself an excellent and dedicated teacher who would want to stay in the classroom forever. Now my TRS combination of 80 can't get here fast enough!
- I have worked previously with another school district and, when I compare it with Fort Worth ISD, the management is very poor. I am a science teacher, and I am very much disgusted at the number of students I have in my classroom; I have over 40 students in one of the classes I teach. State law requires that the teacher make the class at least 40 percent lab, but it is a safety hazard if you even

attempt to have lab in class. Clearly, there has to be something done about these problems. We are expected to act and be professional, yet we are not treated as such... HELP!

- The computers at this school need updating. The Internet is only in certain rooms.
- Fort Worth ISD needs to look into a person's background when moving from one district to another. Administrators need training on how to talk to staff and how to treat staff too. Because they're adults just like he/she is and the staff is not going to talk to them just any kind of way. Teachers and staff deserve a better raise than what the district is giving.
- Too much emphasis on TAAS. Teachers "teach to the test." Too little emphasis on fine arts, science, social studies at elem. level.
- I would like to comment about the use of computers in the classroom. Perhaps the high schools have up-to-date technology, but very few elementary schools do. Yet, the teacher is evaluated on the students' use of technology (PDAS evaluation). My principal has already told us that the district has no plans to put in up-to-date computers and technology in the elementary schools.
- 1) Most of us do the best that we can with what's available. It is frustrating when things never get fixed and you have to pay to fix it yourself when it doesn't even belong to you. Most teachers will pay out of pocket rather than do without something that can be used in the classroom. 2) When power goes out, no electricity, it is common to be required to stay and maintain classes in the dark. This makes for a dangerous situation, and is just one of the many reasons why so many people are leaving this profession.
- South Hills High School is a mess, and should never have been opened. Teachers in portables are closer to a bathroom at a [local business] than a school bathroom. Someone needs to help the poor staff - not to mention the students- and get the construction finished!!
- My first graders, as well as all the others in our school, were without math textbooks for the first 8 weeks of school. There is no excuse for this. I would understand if not enough were ordered, but none were in the school for the 1st graders.
- The reading initiatives implemented by Dr. Tocco have been effective for most students. Reading Mastery, Corrective Reading, and Open Court are all excellent. However, these programs do not reach all students. In the elementary level, Open Court instruction moves at a rapid pace which leaves the lowest students behind. There is an excellent Reading Recovery program which helps restore the lowest students to the class average. Unfortunately, it is not available in all FWISD elementary schools. Placement of this program in all elementary schools would help prevent any student from being left behind. Children in K-2 do not have access to PE

and can't go outside on ozone days. Isn't this a violation of PE requirements outlined in TEKS? There is no districtwide music/art program for students. This is a shame when research proves the value of fine arts in helping students achieve academically.

- I feel that the administrators in FWISD are more concerned about their own personal agendas rather than the welfare of our students. I feel teachers are bullied into doing things rather than being respectfully asked. There is very little accountability for the principals; in many cases they "rule" autonomously and teachers have no recourse when they are unhappy or concerned about the principal's performance. The grievance policy is not adhered to. Therefore, teachers are penalized with reprimands when they choose to file a grievance.
- In K-3, there is no art, music or PE. The teachers are responsible for teaching this, and with the time needed to teach the very expensive newly acquired Open Court, there is no time for the performing arts. In many of the FWISD schools, the TAAS were not quite up to par, and I think this may be due, in part, to the lack of performing arts, science and technology. We don't have enough time to teach all that is required...BOTTOM LINE!
- Teachers of gifted classes should receive a stipend as do the ESL teachers. Extra workshops are necessary to teach the HAP classes but no extra money is provided to the G.T. teachers. Cafeteria food is overcooked, and most of the children throw out enough food to feed an army. If we want the children to eat, survey them as to what they like. I feel it would be better-to offer fish sticks, vegetable soup, macaroni and cheese, grilled cheese-something kids like-rather than throwing out what they don't like or eat.
- My concern is that substitutes are very much needed and substitutes should be paid enough for them to sign up. It should start out as \$100.00 a day. Many substitutes don't have insurance and it takes substitutes too long to get paid. I used to substitute for 10 years and I would not recommend anyone to become a substitute until the pay goes up and insurance is given to that person. FWISD is the lowest paid substitute in this district.
- Fort Worth does not stay with a reading program for very long (2 years) then they change. It is not easy on teachers to change so often. Hard on teachers and on students.
- The warehouse situation is unusually inefficient. Schools in poorer neighborhoods do not seem to receive as much attention for needed maintenance, as do schools in more affluent neighborhoods. On the positive side, Fort Worth has an outstanding Bilingual/ESL department; has excellent police and security situation; and generally tries to improve as a district that has to cope with the usual urban problems.

- The biggest barrier to effective teaching in my school is class size. I teach English/Writing to 6th, 7th, and 8th grade learning disabled students. I have upwards to 22 students in a class. They can't write or order their thinking. There is no way I can be effective with this many kids. I also have a class of children who are mentally retarded. There are 17 children in that class who come to me once a day. How can I possibly help them all? The district looks at numbers, not the impact of the disabling condition on the learning environment. I see 96 special education students everyday!
- As a teacher coming from DISD, I really have few complaints with FWISD. My biggest complaint is not enough classrooms and teachers. Therefore, the student/teacher ratio is very bad. I feel that a class of 37 seventh graders do not get quality education.
- I am concerned that my classroom has only two computers, and one of those is very old. My students could be much more technology literate with at least 4 computers in my classroom. We basically use our computers for word processing.
- I feel that the main stumbling block to the educational performance of the Fort Worth ISD is the students themselves. Many times the students won't study or come in for help whether it is offered before or after school. I get to school before 7:00 am and don't leave till 4:30-4:45 with my school day starting at 8:00-3:00. I even volunteer one of my planning periods to assist my students, and very few students take advantage of it even after contacting the parents. Many times the teachers are blamed when it's not their fault. How about praising the teachers instead for anything that they can acquire from students who don't care?
- I answered no opinion to a majority of these questions because I am not in a position to know details of the issues. I do feel that too much emphasis is placed on meeting the minimum passing scores of TAAS at the expense of challenging educational experiences for students. I feel that the curriculum the average student is exposed to has been dumbed-down because of the TAAS test.
- Many of the categories did not apply because I teach at an alternative school. It is a disaster. There is no support for teachers. Teachers seem to be an afterthought in the classroom. We are supposed to be following the Boystown model of behavioral modification, but the administrators are not following it properly, thus it doesn't work and discipline is non-existent. If teachers try to do anything, we are told not to escalate the anger of the student. In other words, let them do what they want. This school, Pathways 2, should be investigated. Students are not safe here. Students have attacked each other. They have threatened teachers also, with no negative consequences at all. They are allowed to use the most vulgar language you can imagine with no negative consequences. The students are basically running the school. One teacher reported

a case of sexual harassment between students and the administrator wanted him to drop it.

- Before Mr. Tocco became superintendent, you could call any department and speak with someone who had been there for many years and could give an instant answer. Since Mr. Tocco, you can count on being transferred around the system and usually end up with the person you started with, and still no answer. This year I even spoke with someone in speech and hearing department, trying to get testing for a student, and she refused to help me because she said we weren't a Fort Worth ISD school. My biggest complaint is the waste of time at in-service days. How about gang culture and what the teacher needs to be aware of? How about drug awareness? What are the signs of different drugs being used by students? Like those evaluation sheets at workshops, I doubt this will be read too!
- Unbelievable waste of dollars in services held to meet the letter of the law. Presenters frequently cut meeting 1-2 hours short because they too want to get home early. Special education programs that have little contact with actual students. Discipline plans that do nothing more than acquire a prescribed number of infractions for 3rd party action rather than a plan to help wayward students. Some students disrupt classes 7-8 months before any action taken. Team meetings receive funds and yet seldom meet. Priorities: Be prepared for December visit, keep problems from going "downtown" to the Administration Building. My instructions for special education students: Give them a 70 if they do any work at all.
- I think FWISD is a good school district that deserves more credit for the excellent job they do. I love my job and would work nowhere else. Problems are addressed and solutions sought with input from all who are involved. One problem is that teachers need a state health care system and salaries that are equal to other professions with equal education.
- Teachers need to teach and stop taking instructional time away from students with testing (research department). State should involve themselves with the mass exit of our young teachers insurance, paperwork, retirement, late unpaid overtime. (I would disown my own children if they considered teaching - having to work two jobs is not desirable.) Change comes from you, the state!
- Our kids are improving test scores and more are reading at grade level, so we must be doing something right! FWISD is a great district to work for!
- I can only speak for my school. I enjoy teaching at my school. We do not have major problems. However, I used to teach a Fort Worth school that did have major problems. This evaluation needs to be on a school-by-school basis. Schools in a district this large

cannot all be lumped together. We will all either be punished or problems will be overlooked.

- District facilities need to be updated with the addition of computers and telephones or some 2-way communication in all classrooms. Campus camera surveillance should be used more effectively.
- Discipline issues are the primary issues that interfere at my school. FWISD must implement and provide the resources for schools to enforce "three strikes you're out" policy in schools. If a student violates the code of conduct three times, he should be removed from the school. Computers must be put in every classroom with Internet access!
- The district has too many administrators in different curriculum areas that are highly overpaid and we never see them at the campus level.
- The teacher's time is not used wisely on in-service days. They need to be treated more professionally and not be spoon fed info. and should be allowed more, much needed, time in their rooms. The number of accelerated reader books is not enough for our school numbers. We should have the Internet in our rooms. The district needs an Intranet. The warehouse should be online.
- I question what happened to our computers from the TIF grant. Evidently, 25 have not shown up, and downtown says they have no idea where they are.
- I taught for 5 years in the Fort Worth Catholic Diocese before coming to FWISD. I have been extremely happy with my assignment, curriculum, and administrators. There is always room for improvement, however, as a whole the district is focused on instruction for every child. Teacher training for special programs and initiatives has been excellent. Dedicated, hard working teachers should enjoy working for a strong district like Fort Worth. The Open Court Phonics programs are one of the best I have seen in Fort Worth. Student progress is great.
- Technology. All teachers, districtwide, do not have enough computers in their classrooms. One operable computer is not enough when we have so many CD-ROMs for our teaching curriculums. We need AR accessibility and research needs. How are we expected to set up technology stations? This is a wonderful idea, and teaching tools that cannot be used or implemented successfully unless more computers are put in classrooms.
- As a self-contained Special Education teacher, it has been difficult to get a computer in my class. I have brought one from home to use. The principal says sign up for boot camp (a 2 wk program to learn how to use computers; upon completion you get to take one to your classroom). Boot camp is always full when we send in registration forms. Special Education says they don't have the money, it was used for raises. The needs of many most definitely

out-weigh the needs of the few. Our special population should have opportunities to work on computers in the class.

- Too much to teach in a given time frame, plus writing and math to bring up school TAAS scores. Security personnel, our school officer is excellent! However, as a teacher, we have been told not to go to an officer until administrators have conducted an investigation. Gang fights are frequent, and the metal detectors are not used appropriately. Students make threats such as Littleton, Colorado and are not taken seriously.
- Students want and need discipline. Administration is afraid to do so. Teachers are disciplined for doing so. Students love to go to administration because nothing is going to happen. They are quick to tell you administration doesn't care anything about us. Students are allowed to call the principal by first name. Teachers are insubordinate if they try it. Teachers and administration are prejudiced. Buildings are not adhering to teacher ratio state mandates.
- As a new member to the district, most of my experiences have been pretty good. Many of the questions were "no opinion", because of lack of experience in those areas. I do know that several items require looking into. Bureaucracy to the teachers is a huge concern. Health care cost and timeliness of notification of training would be others.
- A major concern this year is the unavailability of substitutes. Substitutes are not arriving for their assignments, so the class has to be split among the remaining teachers, which interferes with the effective delivery of instruction.
- There is too much additional paperwork this year. Our computers do not reach the needs of our students. No funds provided for software. Cafeteria food is awful this year. Food handlers are courteous and kind, but not good cooks. Too much ground turkey. Yuck! Turkey is used for tacos, nachos, spaghetti and turkey meat sauce. Kids throw it away 80 percent free lunches. The menus are awful: several days the menu has been burritos and cheese, broccoli and cauliflower-too much bulkage gas!
- If you are looking for ways to better manage the resources in our district, I think you should start with the maintenance department. A couple of years ago, when I had a new air conditioner installed, there were five guys in my room, four sat around and watched, one worked. We should have an opportunity to rate the maintenance workers jobs that they do for each school.
- I enjoy working with FWISD. I wish I could incorporate more technology in the classroom. More parent involvement would also improve student performance, but it's hard to get.

- We tend to spend way too much time and effort on the low achievers, discipline problems etc. I would like to see kids ability grouped to meet the needs of all kids.
- I feel that the district should have the same high requirement for its administration as it has for its teachers. In 30 years of teaching, I have found that administrators lack empathy, knowledge and professionalism. The breakdown in understanding and implementation comes at the administrative level. They implement by "hysteria" and never give teachers time needed for study, research or preparation. Our district views education from the top down. It should view it from the point of view of the student and teacher. If teachers were given an opportunity to suggest and implement their ideas about educating students, our district could truly be said to have education as the main priority. I would, if this could ever occur in education.
- I have found that discipline is a very important factor in teaching children, but I have experienced a lack of cooperation in getting children disciplined. Sometimes a teacher struggles the whole year with students that are very disrupting in the classroom. I think that this is a big factor in trying to relate instruction in the classroom, and hinders the other children that come to school to learn. It seems the teachers are reprimanded instead of the students.
- Students need to be taught how to use computers to limited software from the hard drive. They need the basics in elementary school computer labs.
- Because of the strong emphasis on reading, language arts and writing, the performance is improving each year. Since the FWISD selected the Open Court Reading Program and Corrective Reading, there has been a consistency of instruction that is helping all children in elementary school. Math is also improving but not as fast as reading. The FWISD is now beginning to direct more attention to science and social studies; probably because TAAS will test this soon. Thanks for asking my input. I hope I have been of help. This is my 20th year with the FWISD.
- Discipline laws not strong enough. Students fighting should not be returned to school. The school year policies should be made strong enough to allow administrators to carry out discipline and tardy policies. A standard should be set by district for art fees per student (mandatory)
- There is a need for fine arts in the elementary grades. There is a high stress and pressure to teach the TAAS (how to pass) and no art, music or fine arts are being taught. Money is being spent on staff development training that most of the time is not helpful or organized.
- Over the three years I've been teaching in FWISD, the district as a whole (along with my campus) have made tremendous

improvements; but I still feel that we have a long way to go before the needs of all students are being met.

- I am very happy with Fort Worth ISD. Fort Worth ISD has the leading reading and math program in the state and the nation. Many people do not understand that Fort Worth has improved its education standards every year. I know, because I have 20 years with Fort Worth ISD. I will never move to another district because of our outstanding school board, and the last two superintendents were educationally and business grounded. The superintendent we have now works with communities of the city, visits schools and teacher unions.
- I think it's excellent. Since Dr. Tocco took over, I have seen determined efforts to diversify the personnel and micro-manage efforts to meet the educational goals of the students. Does the district have a progressive plan to help teachers who are plagued by chronic absenteeism?
- School board members, the superintendent, representatives of teacher groups and teachers at all levels met last year to discuss concerns. The board listened, made many positive comments and then did nothing.
- Instead of threatening a complete in-staff in neighborhood schools because of TAAS scores, someone needs to give workable solutions to the few schools who are not up to par. At most FWISD schools, there are a core group of older employees who are committed to teaching and leading the children living with Fort Worth ISD.
- I work in a very large, very old middle school. It needs new carpet, air quality tests due to flooding years ago. My room has mold in the baseboard and storage closet, and after repeated requests over the last year, nothing has been done. We do not have enough computers for every class to have one, and many of the computers we do have are too old to have even a CD-ROM drive. They are almost useless as instructional tools.
- The TAAS test rules in our district. We don't have time to teach children how to become responsible, effective citizens. We're too busy teaching the kids what's going to be on the TAAS test. We are producing generations of "test takers" not "decision makers." Our school finally became recognized but that's not good enough. Now, we are to become exemplary. So what? What good does it do our kids? If we continue to "raise the bar" the only ultimate outcome is failure. Thanks for asking.
- FWISD, being as large as it is, does not look out for the best interest of teachers, students and parents. We have no technology, no Internet service to speak of. Insurance is not what it should be.
- I feel Fort Worth is a great school district, and I am proud to be a teacher in Fort Worth.

Appendix F

STUDENT SURVEY RESULTS

A. Demographic Data

STATEMENT		CATEGORY		
		No Response	Male	Female
1.	Gender (Optional)		36%	64%

STATEMENT		CATEGORY					
		No Response	Anglo	African-American	Hispanic	Asian	Other
2.	Ethnicity (Optional)	43.8%	20.8%	22.9%	6.3%	6.3%	

STATEMENT		CATEGORY		
		No Response	Junior	Senior
3.	What is your classification?		58%	42%

Appendix F

STUDENT SURVEY RESULTS

B. Survey Questions

A. Educational Service Delivery and Performance Measurement

STATEMENT		CATEGORY				
		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
1.	The needs of the college-bound student are being met.	8%	58%	12%	20%	2%
2.	The needs of the work-bound student are being met.	0%	44%	40%	16%	0%
3.	The district has effective educational programs for the following:					
	a) Reading	6%	64%	18%	8%	4%
	b) Writing	6%	62%	10%	20%	2%
	c) Mathematics	22.4%	65.3%	2%	8.2%	2%
	d) Science	18%	64%	8%	10%	0%
	e) English or Language Arts	14%	56%	14%	14%	2%
	f) Computer Instruction	10%	68%	8%	8%	6%
	g) Social Studies (history or geography)	20%	64%	8%	8%	0%
	h) Fine Arts	16%	64%	14%	6%	0%
	i) Physical Education	14%	54%	30%	2%	0%
	j) Business Education	12%	54%	18%	16%	0%
	k) Vocational (Career and Technology) Education	10%	58%	16%	16%	0%
	l) Foreign Language	14%	60%	10%	14%	2%

4.	The district has effective special programs for the following:					
	a) Library Service	14%	44%	28%	12%	2%
	b) Honors/Gifted and Talented Education	16.3%	51%	20.4%	12.2%	0%
	c) Special Education	16%	36%	44%	2%	2%
	d) Student mentoring program	4%	36%	24%	32%	4%
	e) Advanced placement program	30%	56%	10%	2%	2%
	f) Career counseling program	10%	34%	30%	18%	8%
	g) College counseling program	14%	46%	18%	14%	8%
5.	Students have access, when needed, to a school nurse.	30%	40%	8%	20%	2%
6.	Classrooms are seldom left unattended.	10%	44%	16%	22%	8%
7.	The district provides a high quality education.	8%	28%	18%	34%	12%
8.	The district has a high quality of teachers.	4%	30%	32%	26%	8%

B. Facilities Use and Management

STATEMENT		CATEGORY				
		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
9.	Schools are clean.	6%	56%	8%	16%	14%
10.	Buildings are properly maintained in a timely manner.	4.1%	44.9%	14.3%	24.5%	12.2%
11.	Repairs are made in a timely manner.	2%	40%	8%	28%	22%

12.	Emergency maintenance is handled in a timely manner.	14%	40%	18%	18%	10%
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C. Purchasing and Warehousing

STATEMENT		CATEGORY				
		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
13.	There are enough textbooks in all my classes.	16%	32%	8%	20%	24%
14.	Students are issued textbooks in a timely manner.	12%	42%	10%	22%	14%
15.	Textbooks are in good shape.	6%	34%	6%	26%	28%
16.	The school library meets students needs for books and other resources.	22%	40%	14%	18%	6%

D. Food Services

STATEMENT		CATEGORY				
		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
17.	The school breakfast program is available to all children.	22%	30%	40%	4%	4%
18.	The cafeteria's food looks and tastes good.	2%	22%	26%	26%	24%
19.	Food is served warm.	4%	40%	40%	12%	4%
20.	Students have enough time to eat.	8%	32%	88%	12%	40%
21.	Students eat lunch at the appropriate time.	18%	56%	14%	4%	8%

	of day.					
22.	Students wait in food lines no longer than 10 minutes.	2%	22%	36%	16%	24%
23.	Discipline and order are maintained in the school's cafeteria.	2%	38%	32%	16%	12%
24.	Cafeteria staff is helpful and friendly.	14%	32%	34%	18%	2%
25.	Cafeteria facilities are sanitary and neat.	10.2%	36.7%	34.7%	12.2%	6.1

E. Transportation

STATEMENT		CATEGORY				
		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
26.	I regularly ride the bus.	8.2%	16.3%	12.2%	20.4%	42.9%
27.	The bus driver maintains discipline on the bus.	4.1%	12.2%	73.5%	6.1%	4.1%
28.	The length of the bus ride is reasonable.	6.1%	16.3%	71.4%	2%	4.1%
29.	The drop-off zone at the school is safe.	8.2%	22.4%	63.3%	4.1%	2%
30.	The bus stop near my house is safe.	6.1%	20.4%	69.4%	2%	2%
31.	The bus stop is within walking distance from our home.	8.2%	20.4%	67.3%	0%	4.1%
32.	Buses arrive and depart on time.	4.1%	14.3%	69.4%	6.1%	6.1%
33.	Buses arrive early enough to eat breakfast at school.	6.1%	16.3%	65.3%	6.1%	6.1%
34.	Buses seldom break	2%	16.3%	73.5%	6.1%	2%

	down.					
35.	Buses are clean.	4.1%	16.3%	65.3%	10.2%	4.1%
36.	Bus drivers allow students to sit down before taking off.	8.2%	22.4%	67.3%	0%	2%

F. Safety and Security

STATEMENT		CATEGORY				
		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
37.	I feel safe and secure at school.	6%	48%	14%	28%	4%
38.	School disturbances are infrequent.	4%	38%	20%	32%	6%
39.	Gangs are not a problem in this district.	22%	30%	12%	16%	20%
40.	Drugs are not a problem in this district.	4%	26%	20%	20%	30%
41.	Vandalism is not a problem in this district.	4%	10%	14%	40%	32%
42.	Security personnel have a good working relationship with principals and teachers.	16%	42%	30%	8%	4%
43.	Security personnel are respected and liked by the students they serve.	20%	34%	10%	24%	12%
44.	A good working arrangement exists between local law enforcement and the district.	16%	52%	26%	4%	2%
45.	Students receive fair and equitable discipline for misconduct.	6.1%	26.5%	26.5%	22.4%	18.4%
46.	Safety hazards do not exist on school	2%	32%	30%	26%	10%

grounds.					
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G. Computers and Technology

STATEMENT		CATEGORY				
		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree
47.	Students have regular access to computer equipment and software in the classroom.	8%	38%	10%	30%	14%
48.	Teachers know how to use computers in the classroom.	18%	40%	12%	28%	2%
49.	Computers are new enough to be useful for student instruction.	8%	60%	14%	14%	4%
50.	The district offers enough classes in computer fundamentals.	6.1%	49%	10.2%	32.7%	2%
51.	The district meets student needs in classes in advanced computer skills.	4.1%	46.9%	12.2%	20.4%	16.3%
52.	Teachers and students have easy access to the Internet.	14%	40%	18%	14%	14%

Appendix F

STUDENT SURVEY RESULTS

C. Narrative Comments

The narrative comments below reflect the perceptions and opinions of student survey respondents.

- In one of my classes the air condition was broken. I told the person that is in charge of that everyday, but they would not respond until parents called in. We had no air conditioning in this room for 2 weeks.
- The educational performance of FWISD is okay, except for the fact that there is a shortage of teachers. There is also the factor of the teachers not caring about what goes on.
- At my school the cafeteria is dirty and so are the restrooms. There is no toilet paper or soap. I think there should be a longer lunch period. There is no time for us to eat. That is a big problem at our school.
- I would like for our school to get better books. Also better food.
- I feel that there's no improvement at SHHS due to the campus looking ugly.
- I think the majority of the teachers (not all of them) but the majority, really don't care if a student comes to class or even does the work. This is no one's fault but if we could just get a little more encouragement from teachers and if they could give more than just vocabulary and section reviews out of the textbook, it would be great. I think if we could just get that little push, we, the future of America, would do a whole lot better!
- I think the educational performance is okay. It's not the best; I've seen better. I've been to nine different schools. The teachers are good teachers except for a few and I think it should be recognized.
- I don't really think drugs are a problem even though there are a lot of people who do it or sell it. The education program on computers is good but I hope it can improve. It would be good if the school computers were more advanced with our new technology. The education in our schools is fine. There are many advanced programs and many electives. I feel safe at school and I think many other students do too.
- The time allowed for students to eat lunch is not long enough. By the time you wait in line for food or go off campus to eat, the actual time you have left to eat is about 5 or 10 minutes in order for you to be on time to your next class. I strongly feel that an extra 10 or 15 minutes would be more appropriate for the lunchtime.

- There are two things that are very upsetting. I dislike the 35 minute lunch period and the change of schedule that is done every year. The school district needs to make up their mind because it can harm the education among the students.
- My school, couldn't find a teacher to teach computer science and about 5 students signed up to take computer programming but the class was cancelled because not enough students were interested. But, I think the students who were interested shouldn't be denied the right to take the class. Many students wait in line in the cafeteria and the prices for the subway and bought out pizza are ridiculous. Also, no one respects the principal because she has taken away many school traditions, such as the Howdy dance and the Homecoming parade.
- Many of the Honor/AP classes that I have taken have not been to my advantage in that the teachers knew what they were talking about but had problems explaining it, or they just didn't know what they were talking about. My counselor at my school also doesn't seem to have a clue about what is going on, and that can be extremely upsetting since I'm in the process of getting everything turned in to colleges.
- The punishments given to students don't always equal the offense. A student received the punishment of suspension for wearing flip-flop shoes. The dress code is hard to abide by. Too many of the clothing choices are mandated by the dress code forcing some students to only be allowed to wear 15 or 20 percent of their clothes. A girl had to change shirts when the principal said, "It had too much red," when it was a nice dress shirt, buttoned up and tucked in with slacks.
- I do believe the school can improve in almost all of the areas asked about in this survey.
- Teachers do not respect students in the classroom.
- Fort Worth ISD does not have many classes to help you take similar classes for your college major.
- When a student is absent from school because of illness or a funeral we have to have a doctor's note or our absence is not excused. When a student is suspended from school because of a behavior problem or violent act they get a 3-day vacation at home, excused absence and get to make up their work. Where is their punishment? It's unfair and sad that good kids suffer while bad kids have no punishment!! My parents' tax money should not go toward a behavioral problem student!
- It is my personal opinion that we do not get exposed to many of the scholarships that are available to us. The school district also has low standards, which affects students that go out into the working field and find that they are not prepared. The school library is supposed to have Internet access, but it never works (no printing

access is available). We are not well oriented on how to go about choosing the right college to go to, or on how to look for scholarships. Also, with the construction going on many times our walking space we use to get from class to class is blocked and we are still expected to get to class on time. Last but not least, there is never soap in the restrooms.

- Gangs used to be a problem. But that seems to be a dying fad and is no longer cool. This year a new principal is at the school and great things are happening!
- Educational of Fort Worth ISD is copious. They have many plans such as tutoring TAAS. They helped students pass reading by 85 percent. On the other hand, they have many rules for students. I really hope they keep these rules to make students better. The teachers helped with all one's heart for freshman. All above, I hope educational the same ways to make students and school better.
- There are many things that need to be improved and there are also things that are perfect the way they are. For the most part things are good, thanks to people like you who take the time out to give out surveys like these to show us that you care. With the help of you and the rest of us we can make Fort Worth ISD the best one. I'm a senior this year and I wish you the best for you and the upcoming generation of students to come. Thanks for your support and keep up the good work.
- The district has had many problems with class size at the high school level. Many of my classes average at least 30-35 students. My previous chemistry class had 35 people in a classroom/lab designed for 24 people, an unsafe situation for laboratories. My most pressing concern is the treatment of the advanced academics and programs. All programs that the district has funded have been aimed at vocational skills and basic requirements like the TAAS. Untrained teachers teach AP courses and highest level teachers are required to teach very basic classes, sometimes to the point of three or four lesson plans a day. Students have been put into classes they are not prepared for to fulfill ethnic quotas. To placate protestors the advanced academic programs have lost their individual budgets, directors, and district-wide representation. In some programs, eccentric admissions procedures have resulted in unprepared students with behavior problems in classes they don't necessarily want to be in. It has been announced as a continual goal of Texas public education that Texas be able to supply itself with skilled and specialized workers. It is not possible to fulfill this goal without making sure all students, including those at the top, are taught well.
- I think that you should make the Fort Worth ISD better and safe to be in. The teachers need to teach more and help more when you need help, and be there when you need someone.