

March 18, 2003

The Honorable Rick Perry, Governor
The Honorable David Dewhurst, Lieutenant Governor
The Honorable Thomas R. Craddick, Speaker of the House
Commissioner Felipe T. Alanis, Ph.D.

Fellow Texans:

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

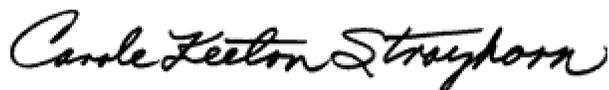
In May 2001, I released the results of my review of the district's operations. This review offered 136 recommendations that could save FWISD taxpayers more than \$23.7 million by 2005-06. Cumulative net savings from all recommendations (savings less recommended investments) were projected to reach nearly \$13.4 million by 2005-06. The review also noted a number of FWISD's exemplary programs and model services provided by district administrators, teachers, and staff.

In June and December of 2002, we returned to check on how well the district's leadership put these proposals into practice. Over the last year, FWISD has implemented, or is in the process of implementing, 131 of the proposals, or 96 percent. The district has invested a net of nearly \$1.4 million to date, but expects those investments to result in savings of nearly \$12.5 million over five years.

This report is available on my Web site at
<http://www.window.state.tx.us/tspr/fortworthpr/>.

Thanks for all that you do for Texas.

Sincerely,



Carole Keeton Strayhorn
Texas Comptroller

c: Senate Committee on Education
House Committee on Public Education

The Honorable Chris Harris, State Senator, District 9
The Honorable Kim Brimer, State Senator, District 10
The Honorable Mary Denny, State Representative, District 63
The Honorable Lon Burnam, State Representative, District 90
The Honorable Bob Griggs, State Representative, District 91
The Honorable Todd Smith, State Representative, District 92
The Honorable Kent Grusendorf, State Representative, District 94
The Honorable Glenn Lewis, State Representative, District 95
The Honorable William Zedler, State Representative, District 96
The Honorable Anna Mowery, State Representative, District 97
The Honorable Vicki Truitt, State Representative, District 98
The Honorable Charlie Geren, State Representative, District 99

Fort Worth ISD Progress Report

Introduction

In May 2001, Texas Comptroller Carole Keeton Strayhorn released the results of the Texas School Performance Review (TSPR) of the Fort Worth Independent School District. Based upon more than seven months of work, this report identified 136 recommendations that could, if fully implemented, result in net savings of \$13.4 million over the next five years. During June 2002 and again in December 2002, TSPR staff returned to assess the district's progress in implementing the report recommendations.

Improving the Texas School Performance Review

Comptroller Strayhorn, who took office in January 1999, consulted school district officials, parents and teachers from across Texas and carefully examined past reviews and progress reports in an effort to make the Texas School Performance Review (TSPR) more valuable, even vital, to the state's more than 1,000 school districts. With the perspective of having served as a teacher, and later a school board president, the Comptroller has vowed to steer TSPR toward being more accountable to local school districts and the communities they represent.

Comptroller Strayhorn began by establishing new criteria for selecting school districts for future reviews. Priority is now given to districts judged poor performing academically or financially, and to hands-on reviews that will benefit the greatest number of students.

Recognizing that only about 51 cents of every education dollar is spent on instruction, Comptroller Strayhorn's goal is to drive more of every education dollar directly into the classroom. In addition, no longer are school districts' best practices and exemplary models left buried inside individual TSPR reports. Instead, Comptroller Strayhorn ordered best practices and exemplary programs to be shared quickly and systematically among all the state's school districts and with anyone who requests such information. There is no reason for a district that has solved a problem well to keep the solution to itself. Comptroller Strayhorn has directed TSPR to serve as an active clearinghouse of the best and brightest ideas in Texas public education. Best practices identified in the original review will be included in the Comptroller's best practices database, *A+ Ideas for Managing Schools (AIMS)*, which is accessible on the Web at <http://www.aimsdatabase.org>.

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

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

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

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

TSPR in the Fort Worth Independent School District

On September 20, 2000, Texas Comptroller Carole Keeton Strayhorn selected Fort Worth ISD (FWISD) for a school performance review. TSPR began work in Fort Worth during October 2000 and issued a final report in May 2001. The report identified two student challenges: lagging test scores (particularly at the middle school level) and high dropout rates, as well as three key administrative needs: comprehensive planning, better documented procedures and technology implementation and integration.

The TSPR report also highlighted FWISD's exemplary programs and suggested 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.

The Comptroller contracted with the Gibson Consulting Group, an Austin-based firm, 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 high school. To obtain additional comments, the review team conducted 14 small focus group sessions with teachers, principals, employees, students, parents and community members. A wide array of parents, teachers and community members also called or sent letters to the Comptroller's office.

The review team received 1,467 responses to a district survey from 243 campus and central administrators and support staff, 103 principals, 420 teachers and 51 students. In addition, TSPR conducted a random telephone survey of 650 area households.

The review team also consulted two databases of comparative educational information maintained by the Texas Education Agency (TEA)-the Academic Excellence Indicator System (AEIS) and the Public Education Information Management System (PEIMS).

FWISD selected peer districts for comparisons based on similarities in student enrollment, student performance and community and student demographics. The selected peer districts included Austin ISD, Dallas ISD, El Paso ISD and Houston ISD. TSPR also compared FWISD to district averages in TEA's Regional Education Service Center XI (Region 11) and the state as a whole.

FWISD in Profile

The state's third largest school district, FWISD serves a culturally diverse population. In 2001-02, the district's enrollment of 81,000 students consisted of 48.1 percent Hispanic, 30 percent African American, 20 percent Anglo, 2 percent Asian Pacific Islander and 0.2 percent Native American. Economically disadvantaged students made up 60.1 percent of the district's student population. These students attended 132 FWISD schools: 77 elementary schools, 24 middle schools, 13 high schools and 18 special and/or alternative education schools.

In 2002, 14 of FWISD's campuses received an *Exemplary* rating from the Texas Education Agency (TEA); 45 schools received *Recognized* ratings; and no schools were rated *Low-Performing* based on academic performance. The district received an overall *Academically Acceptable* rating (projected/based on 2002 TAAS results).

On January 25, 2000, the current Texas Commissioner of Education Jim Nelson ordered the accountability ratings to be changed for 10 FWISD secondary schools because accurate district leaver data had not been

provided to those schools. The TEA's audit indicated that each of these 10 schools had annual dropout rates for 1999-2000 that exceeded the state standard of 5.5 percent for at least one student group on regular campuses and exceeded the greater than 10 percent for alternative education campuses.

Because of the new findings, TEA changed accountability ratings from *Acceptable* to *Not Rated: Data Quality* for the following campuses: Carter-Riverside High School, Arlington Heights High School, Eastern Hills High School, North Side High School, Paschal High School, O.D. Wyatt High School, Dunbar High School, Polytechnical High School and Western Hills High School. In addition, the rating for Fort Worth's Success High School changed from *Alternative Education: Acceptable* to *Not Rated: Data Quality*.

In 2001-02, 87 percent of all students passed the reading portion of the Texas Assessment of Academic Skills (TAAS); 88 percent passed the math portion; 84.9 percent passed the writing portion; and 79 percent of the students passed all tests taken.

In 2001-02, the district employed a staff of 10,467 employees, with teachers accounting for 4,918 or more than 47 percent of FWISD staffing. The district budgeted expenditures of \$477,657,615 for 2001-02. For the same period, FWISD planned to generate budgeted revenues as follows: 45.8 percent through local taxes; 5.4 percent from other local and intermediate sources; 48.3 percent from the state; and .5 percent from the federal government.

In 2001-02, FWISD budgeted 50 cents of every tax dollar on classroom instruction compared to the state average of 51 cents.

Significant changes have occurred in the district since the release of the TSPR report. The death of long-time Board President Gary J. Manny on March 15, 2002, presented some unique district challenges. The timing of Mr. Manny's death prevented the placement of the board president vacancy on the May 4 election ballot. The board successfully petitioned the governor for a special election on August 24, 2002. The close results of the special election necessitated a run-off election held on September 21. In the run-off election, the district selected Lynne L. Manny, Mr. & Manny's widow, to complete the term.

For many years, the Fort Worth ISD has elected the board president as an at-large position; however, the events of this past year have prompted discussion about changing that process. The board began a series of public hearings in September 2002, which it will continue through the spring, to obtain public input before deciding whether or not to continue election of

the board president by a general population vote. The other option under consideration would involve restructuring the board into nine single member districts and selecting the president from elected board members. The board expects to make a decision by May 2003.

The FWISD superintendent said that district staff and board found the TSPR report helpful in furthering the district's established priorities, which the district first wrote more than seven years ago. Those priorities include a focus on safe schools, academic performance and dropout prevention.

Before students can learn and teachers can teach, they must feel safe. Violence in the district has decreased. Teacher organizations no longer rate school safety in Fort Worth as a major concern, but suggest diligence on the issue continue. As a result of the review, Student Affairs, in collaboration with other stakeholders, developed a long-range safety and security plan for the superintendent and the board in February 2003. As recommended, the plan includes performance measures and forms for reporting progress.

Any district's core mission centers on instruction and program delivery. When the superintendent arrived at FWISD in 1994, his first focus concerned the low performance of students in district campuses. At the time, the district faced the potential of an excess of 70 low-performing campuses if it did not reverse the existing trend. Math scores of district African American students were particularly low. The district also needed to develop research-based programs and improve its bilingual education program. The spring 2002 TAAS data showed a dramatic increase. Based upon academic achievement, FWISD has 59 high performing schools and no low-performing schools. However, as a result of dropouts from a Juvenile Justice or Disciplinary Alternative Education Campus that were attributed to the last regular campus attended in the district, four of the district's high schools were rated as low-performing and two others' ratings fell from a *Recognized* status to *Acceptable*.

Superintendent Dr. Thomas S. Tocco said FWISD has clearly turned the corner academically, but he added the district must maintain its focus. The district implemented the TSPR-recommended initiative to establish an effective transition between elementary and middle school. This move encouraged the district to have all content areas and departments collaborate on efforts to improve student academic performance.

Dropout prevention, intervention and remediation are critical to student success. A citywide effort, involving FWISD, the Fort Worth Metropolitan, Black and Hispanic Chambers of Commerce and members of the community emphasizes that all children need to stay in school.

The district has already acted on a Comptroller's recommendation to establish a department centered on dropout prevention and hire a director. In addition, the district created an office for an executive director for school data management, who works in conjunction with the Attendance Control Office and Information Services to assist schools with dropout prevention, intervention and recovery. The executive director will conduct intra-district audits on leavers at the secondary level to ensure that schools utilize relevant data, maintain documentation and follow district guidelines. In order to accelerate high school completion for potential dropouts, the district provided all high schools with 30 PLATO curriculum software licenses and 15 student computer stations to host a Credit Recovery Program (August 2002). By installing the computers and providing an additional 2.5 positions (.5 lab manager, one Stay-In-School coordinator and one Stay-In-School clerk), the district provided schools the tools to help students recover lost credit and aid their efforts to graduate.

With student academic performance improving, the superintendent said he could now turn his attention to the non-instructional functions of the district's operations. The Comptroller recommended a reorganization that would better align all instructional services and curriculum-related departments and non-instructional services. In September 2001, the board approved the superintendent's reorganization plan, placing all curriculum and instruction under one deputy superintendent and aligning all of the business and non-instructional areas functionally under a second deputy superintendent. As a result of the reorganization, the chief financial officer and the chief information officer report directly to the superintendent. Effective January 2003, the internal auditor now reports directly to the board.

The district is solvent, and most recently, however, law enforcement agencies are currently reviewing district construction projects and purchasing procedures and external auditors released the results of a forensic audit on January 28, 2003 showing that the district may have overpaid contractors by millions of dollars because of lax internal controls. The fund balance has increased to optimum levels, as defined by TEA guidelines, with some planned expenditures of reserves to restore two aging facilities.

Clearly, the district still has work to do, particularly in addressing the concerns contained in the forensic audit. Yet, FWISD staff and TSPR team members concur that the district has made steady progress on the recommendations. FWISD has implemented 116 recommendations; has 15 in various stages of progress; and reviewed two that it has not yet implemented. The district rejected three recommendations as being

unworkable. (See **Appendix A** for details on the recommendations' status.)

Fort Worth ISD Report Card

Chapter	Total	Complete	In Progress	Not Implemented	Rejected	Percent Complete/ In Progress	Grades
District Organization and Management	12	12	0	0	0	100%/0%	Excellent
Educational Service Delivery	15	14	1	0	0	93%/7%	Excellent
Community Involvement	1	0	0	1	0	0%/0%	Needs Work
Personnel Management	16	14	2	0	0	88%/12%	Excellent
Facilities Use and Management	15	13	2	0	0	87%/13%	Excellent
Asset and Risk Management	8	7	1	0	0	88%/12%	Excellent
Financial Management	13	10	2	0	1	77%/15%	Satisfactory
Purchasing and Warehouse Management	9	5	3	0	1	56%/33%	Satisfactory
Computers and Technology	10	7	3	0	0	70%/30%	Satisfactory
Transportation	16	14	1	1	0	88%/6%	Excellent
Nutrition Services	7	7	0	0	0	100%/0%	Excellent
Safety and	14	13	0	0	1	93%/0%	Excellent

Security							
Total	136	116	15	2	3	85%/11%	Excellent

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

Exemplary Programs and Practices

FWISD has experienced some notable successes, and TSPR identified numerous "best practices" in the district. Through commendations in each chapter, the original report highlighted model programs, operations and services provided by FWISD administrators, teachers and staff members. The Comptroller's office encourages other school districts throughout Texas to examine these exemplary programs and services to see if they could be adapted to meet local needs. TSPR's commendations are described below, with updated information in italics following each commendation.

- ***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 increasing academic achievement and improving 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.

As the number of FWISD high-performing schools increase, the need for reconstituting low-performing campuses diminishes. In 2002, the district achieved an all time high of 59 campuses rated either Recognized or Exemplary according to the state accountability standards and had no low-performing schools.

The administration staff said that "reconstituting low-performing schools" has significantly contributed to these remarkable results. As one of the largest urban districts in the state, Fort Worth's dedication to improving student performance is reflected in the number of schools reconstituted for low performance. The district will continue to monitor individual schools and consider options,

including reconstitution and/or partial reconstitution, to reach the goals set by the board and the superintendent.

- ***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 (the latest year for which statistics are available) compared favorably to its peer districts, which averaged \$15.85 per student in legal fees. FWISD's legal fees for outside counsel dropped by another \$23,000 last year.

By continuing to use a staff attorney and reducing legal work outsourced to private sector attorneys, FWISD decreased legal fees for fiscal year 2001 by approximately \$75,000 from fiscal year 1999. In addition, the district's legal fees have remained under \$10.00 per student through 2001. The FWISD staff attorney's responsibilities have increased and now include personnel issues, employment contracts and open record requests. By effectively using the staff attorney for district legal issues and decreasing the amount of work outsourced to private attorneys, FWISD continues to save district legal costs.

- ***Strategies control employee health care premiums.*** In spite of general increases in health care costs, FWISD offers lower premiums than the peer district average for each coverage category, while offering benefits similar to the peer districts. To control the overall cost of health care, the district bids out employee 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.

While maintaining the quality of health care service to employees, FWISD's administration and the board remain steadfast in seeking ways to decrease medical insurance costs. The district performs independent claim reviews and audits to re-capture claims paid incorrectly and to evaluate the claim system.

- ***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.

FWISD continues to pay an external investment advisor. In addition to providing monthly reports to management and quarterly reports to the board, the investment advisor helps update the investment policy annually and evaluate cash flow analysis. The advisor provides these services for the same fee of 0.15 percent of the total monthly balances.

- ***Sound inventory controls protect assets.*** FWISD's central warehouse controls inventories by maintaining lists of commodities by number, description and scheduled inventory counts. The warehouse shares the list with the Accounting Department and the Internal Audit Department 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.

Central warehouse staff, in collaboration with the deputy superintendent for Operations Management and Human Services, continue to monitor and amend procedures to minimize losses.

- ***Competitive bidding, testing and evaluation hold custodial supplies costs down.*** FWISD bids out 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.

FWISD maintains its efforts to seek "best buys" for custodial supplies. In addition to publishing bids, the district also obtains pricing information from the Texas Association of School Board's (TASB) Buy Board and Region IV Texas Cooperative Purchasing Network. The district continuously tests products' effectiveness.

- ***Energy management program contains costs.*** FWISD developed an effective energy management program that has held down costs by more than \$1.5 million during the 1999-2000 and 2000-01 school years. May 1997, the district signed a performance contract

that included an energy accounting software program, employee training on 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.

Since the initial TSPR visit, the district has contracted with Logical Solutions, Inc. to ensure Vision 20/20, the district's software program that controls the energy management system, controls all buildings. The State Energy Conservation Office (SECO) provided the funding to evaluate the heating, air conditioning and ventilation systems in the district's largest high school.

- ***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 and award 11 teachers each \$10,000 cash stipends. Deserving teachers are recognized, and others are encouraged to excel.

FWISD honored 13 teachers in the fall of 2001 as Chairs for Teaching Excellence. Each teacher received a \$10,000 honorarium from the following:

- *Bank One/English*
- *Southwestern Bell/Performing Arts*
- *FFP Marketing/Elementary Reading*
- *Miller Brewing Company/Social Studies*
- *Lockheed Martin/Elementary Math*
- *Lockheed Martin/Elementary Science*
- *Radio Shack/Secondary Mathematics*
- *Radio Shack/Secondary Science*
- *Rotary Club/Special Education*
- *Pier One Imports/Language Center*
- *XTO Energy/Early Childhood (two awards).*

The Molyneaux Foundation and West Area Rotary Club established a new chair for Teaching Excellence in the area of Special Education in 2001. That same year, 14 teachers in all 11 categories received \$1,000 honorariums as finalists. In 2002,

Omni American Credit Union established a new chair for Teaching Excellence in Career and Technology Education.

TSPR Key Recommendations

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

District Organization and Management

Recommendation 6: - Automate the policy manual and immediately update policy changes.

FWISD is currently automating the policy manual. In order to comply with TASB requirements, the district had to update the policy manual prior to its automation. All sections have now been updated and approved. TASB is entering all information, targeting March 2003 for completion.

Educational Service Delivery

Recommendation 13: - Establish a districtwide elementary and middle school initiative that identifies and addresses critical issues regarding effective transitions.

Administrators said that this recommendation encouraged the collaboration of all content areas and departments to focus on student academic improvement and to recognize each area's and individual's contribution to the task. Officials said that whether individuals or departments agreed on every aspect, the participants heard each others' concerns and were open to discussion. As a result of this effort, the Curriculum/Transition team, established in October 2001, has begun addressing disparities in performance at all grade levels and in each of the core subject areas.

Recommendation 14: - Encourage ethnic minority and economically disadvantaged students to take and pass advanced academic courses and college entrance examinations .

District administrators said this recommendation will have the greatest impact on ethnic minority and economically disadvantaged student progress and life success. Academic coordinators visit classes each

January before student registration for next year. They present the advantages of advanced placement (AP) course work in preparing students for college and the advantage to having AP courses on a high school transcript. This year, the counselors and some academic coordinators plan to visit privately with each student for 15 minutes to discuss the student's academic record and choices for the next year. FWISD has devised and implemented a districtwide SAT plan to focus on improving scores and increase the number of students in the program. The district has also expanded AVID, a national program designed to increase minority and low socio-economic student representation in four-year universities, from six to 10 sites.

Personnel Management

Recommendation 29: - Increase professional requirements for Human Resource administrators.

FWISD reorganized its Human Resource Department focusing on employees with varied experiences and expertise. The injection of these employees' new ideas helped revitalize the department and renewed staff commitment to provide the best-qualified teachers in FWISD classrooms. As a result of new Human Resource efforts, FWISD goes beyond the typical hiring process philosophy, encouraging staff to operate in a "look outside the box" environment for the best and brightest hiring practices.

Recommendation 42: - Issue contracts only for positions requiring certification or permits.

The district reduced the types of contracts issued by 50 percent. This change resulted in decreased department workload, eliminated confusion about which contract to issue for specific projects and prevented the need to hire temporary staff. Additionally, the district automated its hiring process, cutting basic supply costs. The district expects the savings from this recommendation to be \$5,300 over the next five years.

Recommendation 43: - Standardize format and common elements for performance appraisals of non-teaching staff.

The district finalized new appraisal instruments in May 2002. According to district administrators, evaluating employees based on standard criteria will not only help the district ensure the equity of appraisals but also the legality of all appraisals.

Recommendation 44: - Provide mini-conferences to non-instructional supervisory personnel.

Recommendation 54: - Provide a comprehensive training program for the maintenance staff to improve effectiveness and productivity.

Recommendation 56: - Develop a comprehensive and mandatory training program for custodial staff.

District staff said providing coordinated training has been particularly useful for the custodial staff. Now, head custodians meet as a group for training and leadership development. District administrators also said the training has resulted in improved safety practices that help to prevent accidents from wet floors or inappropriately posted warning signs. The district is also experiencing more pride among the custodians for their jobs and the children in their schools.

Facilities Use and Management

Recommendation 46: - Develop five-year enrollment projections for all schools by grade level and update the enrollment projections annually.

In February 2002, the Research and Evaluation staff completed five-year enrollment projections by school and grade level. Additionally, an outside consultant completed a second projection in March 2002 as part of redistricting. District administrators said these projections verified some of FWISD's assumptions, enabling the district to better plan for the future.

Asset and Risk Management

Recommendation 65: - Raise the fixed assets capitalization threshold to \$5,000 for assets accounted for in the Fixed-Asset Group of Accounts.

Previously, the fixed asset inventory included everything from student desks to low-dollar audio equipment. By raising the capitalization threshold to \$5,000, as recommended in TEA's Financial Accountability System Resource Guide, the district has significantly reduced the number of items to track, making the process easier and more efficient.

Financial Management

Recommendation 78: - Restructure the Internal Audit Department to report directly to the board.

The district's internal auditor said this change in reporting established a relationship between the board and the internal auditor and raised the board awareness of internal audit issues.

Computers and Technology

Recommendation 90: - Increase Information Technology Service (ITS) support staff by five positions.

The district is still determining how many staff it needs, but the new chief information officer (CIO) said his initial plan requires only two additional staff. In an effort to improve customer service and response time, under the CIO's plan, the district will locate the technicians closer to the campuses they serve. This change should also help technicians become more familiar with certain buildings and users, enabling them to identify recurring problems that require additional attention.

Recommendation 93: - Update the District Technology Plan on an annual basis.

The district's three-year technology plan did not contain information on all of the district's programs and initiatives. Revising the technology plan encouraged the district to focus on the future. The new CIO said the revised plan, when implemented, will ensure the availability of technology used effectively for academics and administration.

Transportation

Recommendation 102: - Provide an appropriate number of employees for routing and scheduling in the Transportation Department.

Recommendation 104: - Implement a performance-monitoring program to measure accomplishments and identify areas for improvement.

District administrators said new staff and resources have equipped the Transportation Department with the tools to ensure the efficiency of bus routes and that it transports students more efficiently. The increased staffing has enabled the department to create reports and monitor programs to improve productivity.

Nutrition Services

Recommendation 118: - Implement the automated payment feature for meals.

Although installing and using keypads at all schools involved an intense learning process for teachers, principals and students, the new system has reduced the department's workload and improved the management and recording of meals served.

Recommendation 119:- Request the City of Fort Worth Health Department to inspect all FWISD school cafeterias on an annual basis.

After evaluating city and county services and costs, the district initiated an agreement with the Tarrant County Environmental Health Department starting in September 2002. Two visits per site are scheduled on an annual basis to ensure compliance with codes.

Safety and Security

Recommendation 135: - Align the oversight responsibilities for all alternative education programs (AEP) under the director of Alternative Schools.

The superintendent praised this recommendation, which caused the district to rethink its approach to alternative education. By eliminating the contract sites formerly responsible for the district's AEP, FWISD improved program attendance, educated students closer to home and aligned curriculum with the home school academic program. Several campus level administrators said that students in these programs now receive a higher quality education.

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.

In February 2002, the district formed a discipline stakeholder committee to determine best practices being implemented on campuses. The committee included principal representatives from each feeder pattern in the district. The discussion among principals identified opportunities for change and improvement. The district will use the committee-developed information during new administrator training. In order to reach the largest district audience, FWISD will post best practices on the intra-district e-mail system, First Class, starting in February 2003.

What Still Needs to be Done?

FWISD has made steady progress in implementing TSPR recommendations. One hundred and sixteen recommendations have been implemented; 15 are in various stages of progress; and two have been reviewed, but not implemented. The district rejected only three recommendations as being unworkable.

In June 2002, TSPR staff returned to Fort Worth to assess the district's progress toward implementing the recommendations contained in the May 2001 report. Staff found that some work still remained to be done, particularly in instituting a strong system of internal controls. During the last six months, the district and TSPR have remained in constant communication, and the following policies and procedures have been implemented to address these identified areas of operational concern.

Recommendation	Strategies for Improvement	Responsible Department
<p>Rec. #81: Develop a process for monitoring purchasing procedures and enforcing the district's purchasing policies.</p> <p>Rec. #68: Require all accrued expenditures be included in the final budget amendment presented to the board.</p>	<p>In June 2002, the chief financial officer implemented a procedure to hold district staff accountable for following Board Policy CHD - Guidelines Regarding Purchase Orders. Anyone buying goods without issuing a purchase order, without receiving validation of the purchase order by the Purchasing Department or entering a purchase order after the fact must provide an explanation approved by a deputy superintendent. Letters of concern and formal reprimands have been issued to violators. Continued abuses can result in further disciplinary action or termination.</p>	<p>Accounting</p>
	<p>In September 2002, the superintendent and chief financial officer sent a memo to the board outlining changes in controls and procedures that impact four separate departments regarding unit-price projects. For example, any concrete project at any one location exceeding \$10,000 will require separate formal bids be submitted to the board for approval.</p>	<p>Internal Audit, Accounting, Purchasing, Maintenance</p>
	<p>In September 2002, the superintendent approved administrative regulations for authorizing purchases and approving payments chargeable to</p>	<p>Superintendent, Finance</p>

	<p>the bond program. Bond expenditures exceeding \$20,000 now require the superintendent's approval.</p>	
<p>Rec. #12: Develop additional performance measures to evaluate the district's performance, particularly for non-instructional areas.</p>	<p>A strategic plan for non-instructional areas is being incorporated as a part of the district improvement plan. This recommendation resulted in a review of overtime expenditures by department and a written report. In December 2002, the district drafted administrative regulations for restricting and controlling time off granted to exempt employees (employees not covered by the Fair Labor Standards Act) for working extra hours. The district issued overtime procedures to increase control of overtime costs.</p>	<p>Superintendent, Operations Management, Finance, Human Resources</p>
<p>Rec. #35: Evaluate the cost of all procedural and policy changes.</p>	<p>In December 2002, after reviewing the cost of certain personnel benefits, the internal auditor drafted administrative regulations to limit and control district expenditures for cell phones. Instead of providing cell phones to all employees and requesting reimbursement for non-business related calls, the district now requires key employees to purchase a cell phone and the district will reimburse the employees based on a monthly allowance.</p>	<p>Superintendent, Finance</p>
<p>Recs. #76 through 80: [Strengthen and clarify the role and responsibility of the Internal Audit Department]</p>	<p>On December 17, 2002, the board approved, on first reading, restructuring the internal audit function to report directly to the board. Additionally, the board elevated the lead internal auditor position to a director position, upgraded the position of internal auditor one pay grade, added a position of senior auditor to the</p>	<p>Board, Internal Audit, Superintendent</p>

	department and approved an annual audit plan.	
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Source: TSPR Interviews and December 18, 2002 letter from Dr. Tocco to the Comptroller.

Recently, the district received the results of an external audit and may soon receive the findings of a federal investigation into allegations of financial wrongdoing. These new district policies and procedures provide a good first step in establishing a strong system of internal controls, but as with the TSPR, each of the findings in these reports must be taken seriously and addressed individually.

As FWISD moves forward, it faces three basic challenges: restoring public trust, operating as a team and maintaining focus on instruction.

Restore Public Trust

Following media reports regarding allegations of district misconduct, the public has become deeply concerned about FWISD's stability and integrity. The FWISD board and administration must openly communicate facts rather than allowing rumors and innuendos about current and former employees to continue. Without exception, the board must hold the individuals who have violated board policy and the public trust accountable for their actions. The board must establish the precedent that circumvention of district policies and rules will not be tolerated. Relationships with friends, neighbors and co-workers may be broken during this difficult and painful process. But hurt it must - those who have violated the public trust must understand that circumvention of the rules will simply not be tolerated.

The superintendent and the board, who clearly have been dedicated and aggressive in addressing district academic concerns, must now ensure that all of the policies and procedures established to date and, as required as a result of the external audit findings, are fully implemented. The Comptroller commends the FWISD board for contracting the external audit and for establishing policies. However, the board must now take the next step to obtain assurances from the administration and the internal auditor that staff, vendors and anyone else involved in the process, including the board, comply with those policies and procedures.

The board must devote attention to the construction and maintenance processes, which are areas of particular concern. Action should not be limited to those areas. Purchasing laws and rules at all levels must be

adhered to and controls over all non-instructional operations must be strictly enforced.

Operate as a Team

One of FWISD's greatest strengths TSPR observed during the review process was the collaborative working relationship among members of the board and between the board and the administration. Unfortunately, the controversies of the last year have damaged some of those relationships, hindering the board and administration's ability to work in harmony on students' behalf. For example, the December 2002 board meeting lasted past midnight as board members and administrators questioned and re-questioned issues. In the absence of trust, even the most basic district actions are being debated.

Restoring the public trust cannot be accomplished overnight, nor is it something that can be accomplished by one or two people. It will take a team consisting of board members and administrators a year or even two to make the necessary changes that prove to the public past actions will not be repeated.

This is not to advocate that every board vote be a unanimous decision. It does suggest the need for individuals to set aside personal differences, communicate openly and honestly on all issues, treat each other with respect and remain focused on the goals and objectives set forth by the board to serve the district's students. Teamwork, which in the past has been FWISD's greatest strength, can become a district asset once again.

Keep the Focus on Instruction

The district, the board, the administrators and the campus staff cannot allow themselves to be distracted by the immediate controversies. FWISD is still the envy of the other larger urban districts in Texas academically and in many other ways. FWISD enjoys tremendous community support and provides its children a high-quality education. Instruction and program delivery remain the core mission of any district, and FWISD understands that mission and has made dramatic student performance gains districtwide.

Despite the controversies and allegations, FWISD must remain focused on providing quality instruction. The district must continue its exemplary programs, as well as monitor and adjust programs to address any identified weakness. Teachers must continue to be valued and recognized, as the district has done through its Chairs of Teaching Excellence award program. FWISD must continue preparation for the more stringent Texas Assessment of Knowledge Skills (TAKS) and efforts to reduce the number

of dropouts. As Comptroller Strayhorn has said many times, "Nothing is more important than education and our children are our most precious resource."

FWISD's Ideas for Improving the Texas School Performance Review

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

The feedback TSPR has received from other districts led to improvements in the review process. For example, early reports did not include implementation strategies, and district officials told TSPR they needed help in getting started. As a result, the reports now include IMPLEMENTATION STRATEGIES AND TIMELINES to supplement the recommendations. District officials have told TSPR these blueprints are invaluable to achieving the desired results. It is important, however, for TSPR to be mindful of those things that did not work as intended so the review process can be continuously improved.

Fort Worth administrators and board members made the following observations:

Surveys sent to board members requesting their observations about the review process were generally positive. Board members said that they felt the review was fair, highlighting both the challenges facing the district as well as the exemplary programs and practices. One board member commented that most decisions on the recommendations were not difficult, because the recommendations were very logical and realistic. Board members made no suggestions for improving the process.

Dr. Tocco and his staff voiced similar praise for the review, but voiced concern about the cost of implementing some of the recommendations during discussions with staff. TSPR had assumed that district staff could perform much of the necessary work in house, while the district's approach included hiring external consultants to assist in the process. Administrators said they thought the consultant costs were necessary, because district staff did not always possess the expertise to accomplish certain tasks. TSPR staff will be mindful of these comments and try to assess the cost of external expertise when needed.

The district staff expressed concern about the tight implementation timelines suggested in the original report. Taken individually, the timelines seemed reasonable, but when taken collectively, it was difficult for the designated staff to assume the responsibility for implementing numerous recommendations without assistance. TSPR has heard this comment in the past and has attempted to adjust timelines to make them more realistic. On the other hand, TSPR is also well aware that progress in implementing the recommendations is typically made within the first year. Recommendations that take longer than a year to fully implement or set into motion are often never accomplished. TSPR staff will continue to work through these competing factors and make every effort to be realistic in proposed implementation strategies and timelines.

Appendix A - Status of Recommendations and Savings

Rec #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	FWISD's Projected Five-Year Savings (Costs)	Comments
Chapter 1 District Organization and Management						
1	Formalize assignment and responsibilities of board committees. p. 30	Complete	\$0	\$0	\$0	The district drafted a document defining board committees' membership, roles and responsibilities. The committees include: Budget/Audit, Technology Advisory, District Advisory, Human Relations, Curriculum/Instruction and Calendar. The board approved the document on January 14, 2003.
2	Approve board minutes no later than one month after the date of the meeting. p. 31	Complete	\$0	\$0	\$0	The board approved a procedure to expedite approving board minutes in June 2001. The timeframe, however, is 60 days rather than the recommended 30 days.
3	Start board meetings on time, use timed agendas and reduce the length of board meetings. p. 32	Complete	\$0	\$0	\$0	Beginning in September 2001, the board and staff made a conscious effort to begin board meetings on time and to create agendas that are more time efficient.
4	Track board member training hours to ensure compliance with	Complete	\$0	\$0	\$0	In May 2001, the district began tracking board members' training hours to

	state regulations for continuing education. p. 34					ensure board members comply with State Board of Education (SBOE) requirements.
5	Provide orientation for new board members. p. 35	Complete	\$0	\$0	\$0	The board office prepared orientation materials in April 2002, but during the May elections all incumbents were re-elected. The district provided orientation to the new board president.
6	Automate the policy manual and immediately update policy changes. p. 36	Complete	\$45,550	\$0	\$40,850	In order to comply with TASB requirements, the district had to update all sections of the policy manual prior to its automation. All sections with the exception of Section D have now been updated and approved: Section A (April 23, 2002), Section B (August 27, 2002), Section C (August 13, 2002), Sections E-F-G (October 22, 2002). Section D was presented to the board for the first reading on January 14, 2003. TASB is entering all information, and the target date for completion is March 2003.
7	Create a full-time policy and procedures coordinator	Complete	(\$150,420)	(\$14,300)	(\$228,000)	The district filled the policy and procedures coordinator position on October 14, 2002 at

	position and begin documentation of procedures. p. 38					an annual salary of \$57,204. The cost shown is prorated for October through December 2002.
8	Realign the organizational structure to reflect a logical alignment of functions that can be linked to the planning and budgeting process. p. 44	Complete	\$0	\$0	\$0	Following an in-depth study, the superintendent proposed a new staff organizational plan, which the board approved on September 18, 2001.
9	Apply existing elementary formulas to determine appropriate staffing levels for schools. p. 49	Complete	\$2,768,696	\$0	\$0	The district did not reduce staffing; however, it modified staffing patterns when applying the formulas uniformly throughout the district in April 2001. Elementary schools with less than 500 students have a choice of either an assistant principal or an instructional specialist. The only exception occurs when the campuses use Title I funds to hire additional staff. Implementing this recommendation resulted in moving individuals between campuses and more equitable distribution of administrative staff.
10	Start the planning process in December of each school year to	Complete	(\$20,000)	\$0	\$0	Planning for the 2002-03 budget began in December 2001. A revised timeline for the

	allow sufficient planning time for the next year's budget. p. 52					budget planning process approved for 2002-03 will enable the strategic plan and accompanying spending priorities to drive the budget.
11	Expand the scope of the Strategic Plan and District Educational Improvement Plan to include more non-instructional areas. p. 57	Complete	\$0	\$0	\$0	The superintendent, board and District Advisory Committee added the recommended non-instructional areas to the District Education Improvement Plan (DEIP) for 2002-03.
12	Develop additional performance measures to evaluate the district's performance, particularly for non-instructional areas. p. 59	Complete	\$0	(\$35,000)	\$7,902,000	The district hired an outside consultant to help develop additional performance measures for non-instructional services in January 2002. A strategic plan for non-instructional areas has been incorporated as a part of the 2002-03 DEIP. One of the outcomes of this recommendation was a complete report on and review of overtime expenditures by department. As a result, the district implemented an overtime request form that requires prior approval. District officials anticipate nearly \$2 million in overtime savings in 2002-03 and each year thereafter.

	Chapter 1 Total		\$2,643,826	(\$49,300)	\$7,714,850	
	Grand Total All Chapters		\$13,389,583	(\$1,360,083)	\$12,479,954	

Appendix A - Status of Recommendations and Savings

Rec #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	FWISD's Projected Five-Year Savings (Costs)	Comments
Chapter 2 Educational Service Delivery						
13	Establish a districtwide elementary and middle school initiative that identifies and addresses critical issues regarding effective transitions. p. 81	Complete	\$0	\$0	\$0	FWISD established a Curriculum Transition team in October 2001 to address disparities in performance at all grade levels and in each of the core subject areas. The team has: produced concepts ("Big Ideas") at each grade level for each course compared the complexity of the concepts from grade level to grade or course level; agreed on the points in the curriculum where key concepts need to be reinforced; and, re-taught and formulated benchmark assessments required to ensure student learning at all levels.
14	Encourage ethnic minority and economically disadvantaged students to take and pass advanced academic courses and college entrance	Complete	\$0	\$0	\$0	FWISD has devised and implemented a districtwide SAT plan to focus on improving scores and increase the number of students in the program. The district

	examinations. p. 85					<p>has also expanded AVID, a national program designed to increase minority and low socio-economic student representation in four-year universities, from six to 10 sites. In 2001-02, the district expanded the High Academic Programs (HAP) previously offered in grades 1-4 into grade 5. HAP classes provide students with learning experiences that reflect more complex and in-depth understanding. These classes enable high-achieving students or students with the potential to achieve at higher levels, to be challenged in their home schools. The district designed social studies, science and math curricula on a conceptual basis to include a greater level of depth and complexity. The board also approved honors classes in all middle schools in 2002-03 and expanding special programs for 2002-03 such as TexPrep, which is a summer program that FWIST</p>
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						shares with Texas Wesleyan University. In 2001-02, the board also approved adding Texas Scholars, a program that uses community volunteers to help motivate students to stay on the recommended diploma plan until graduation.
15	Implement plans to reduce TAAS exemption rates for all students. p. 87	Complete	\$0	\$0	\$0	District administrators met and identified the reasons for higher than average Texas Assessment of Academic Skills (TAAS) exemption rates in fall 2001. The Bilingual and Special Education Departments monitor all exemptions (Limited English Proficient (LEP) and Special Education). With the Texas Assessment of Knowledge and Skills (TAKS) exam and the State Developed Alternative Assessment (SDAA) scheduled for spring 2003, exemption rates should continue to decrease.
16	Develop strategies that prepare students to pass the end-of-course examinations.	Complete	\$0	\$0	\$0	The district developed and emphasized strategies in 2001-02

	p. 90					to prepare students to pass the end-of-course examinations including increased vertical articulation or the continuum of knowledge and skills from one course to another; increased the number of training tapes available for teachers; and, implemented a common planning time for affected campus-based math teachers.
17	Incorporate instruction that addresses the needs of minority and limited English proficient upper elementary and middle school students in the district's existing reading initiative. p. 97	Complete	\$0	\$0	\$0	In December 2001, the district developed strategies to address the needs of minority and Limited English Proficient (LEP) students, including assessing the effectiveness of the current reading initiative, developing an action plan, providing staff development and monitoring the implementation process.
18	Create the Office of Student Attendance and Dropout Initiatives and hire a director. p. 104	Complete	(\$376,940)	\$0	(\$529,390)	In August 2002, the district created a new position, which it staffed with existing personnel, to address PEIMS/data reporting, leaver reports and internal campus audits/relationships to

						<p>attendance and dropouts.</p> <p>In addition, the board approved two-and-a-half positions (a Stay-In-School coordinator, a Stay-In-School clerk and .5 PLATO lab manager) for each traditional high school campus. The district also provided the high schools with 15 student computer workstations and curriculum software for a credit recovery program in July 2002 at no cost. The district cost will result from additional staffing.</p>
19	Create a Dropout Prevention/Reduction Task Force including community, business, education and civic organizations. p. 106	Complete	\$0	\$0	\$0	<p>In August 2001, Texas Christian University (TCU) Chancellor Michael Ferrari accepted the role of corporate champion for the Dropout Prevention/Reduction Task Force. A group of business leaders have agreed to serve on the task force. Also, the Fort Worth Hispanic and Metropolitan Black Chambers have formed a steering committee and held a summit in fall 2002 to involve the community in the</p>

						district's dropout prevention efforts.
20	Assign non-counseling duties currently performed by counselors to other school or district personnel. p. 109	In Progress	\$0	\$0	\$0	The executive staff recognizes the need to assign counselors' non-counseling duties to other school or district personnel. After a close review of the fiscal impact study provided by a committee of administrators in May 2002, the board decided that the cost to fully implement this recommendation exceeded the current budget. However, the district is removing clerical and administrative duties from school guidance counselors to increase the direct and responsive services to students. For example, secondary assistant principals now handle course scheduling, a duty previously performed by counselors.
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	Complete	\$0	\$0	\$0	In August 2001, the superintendent assigned the associate superintendent for Instruction the responsibility for all budgeting and planning functions for federal (Title I, Part A) and state.

						compensatory education programs.
22	Incorporate a review of compensatory education programs within the Planning and Monitoring function of the district's Quality Review Team responsibilities. p. 116	Complete	\$0	\$0	\$0	In August 2001, the superintendent, as part of the district reorganization, consolidated all budgeting and procedures for compensatory education under the Quality Review Team (QRT). The QRT monitors schools' accounts for all state compensatory education funds.
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	Complete	\$0	\$0	\$0	During November 2001, the Special Education Department met with representatives from Information Services to design queries and monthly reports relating to special education student data. Campus and central administrator use the monthly reports to assist in program planning, staffing and complying with state and federal regulations.
24	Automate Special Education data entry, reporting and Medicaid billing. p. 126	Complete	\$0	\$0	\$0	In May 2002, the board approved buying a new special education student management software system to improve the

						management and delivery of services to special education students. The system which includes a module to process Medicaid billing, should increase Medicaid reimbursements. The vendor guarantees that increased recovery of Medicaid expenses will cover a portion of the system's cost. Because the projected Medicaid reimbursement increase and other grant funds will pay for this system, no cost is displayed.
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	Complete	\$0	\$0	\$0	In February 2000, the administration assigned a committee from the Bilingual/ESL Department and Information Services Department to revise procedures for correcting Public Education Information Management System (PEIMS) reporting. By August 2001, the committee had developed written directions and samples showing bilingual/English as Second Language (ESL) coding on

						Position/Personnel Authorization (PPA) forms. The information has been distributed to principals and school staff. Information Services and Bilingual/ESL staff will monitor effectiveness through analysis of PEIMS reports.
26	Analyze data and evaluate the Career and Technology Education (CATE) programs to identify ways to maximize program effectiveness. p. 138	Complete	\$0	\$0	\$0	The district formed a committee of staff, teachers, parents and community members to analyze data on a quarterly basis in the fall of 2002. The committee reviews enrollment numbers, ethnic and gender breakdown and the number of students who take advanced courses. CATE staff use committee recommendations to update and develop goals and objectives for program improvements.
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	Complete	\$0	\$0	\$0	The director for Health Services provided information in spring 2002 that indicated the self-sufficiency of all four sites.
	Chapter 2 Total		(\$376,940)	\$0	(\$529,390)	
	Grand Total All Chapters		\$13,389,583	(\$1,360,083)	\$12,479,954	

Appendix A - Status of Recommendations and Savings

Rec #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	FWISD's Projected Five-Year Savings (Costs)	Comments
Chapter 3 Community Involvement						
28	Reclassify secretarial position in School and Community Partnerships from pay grade 4 to pay grade 5. p. 154	Not Implemented	(\$10,805)	\$0	\$0	Because of budgetary constraints, the board denied the administration request to reclassify the secretarial position in School and Community Partnerships. The administration said that as funds became available it would resubmit this recommendation to the board.
	Chapter 3 Total		(\$10,805)	\$0	\$0	
Grand Total All Chapters			\$13,389,583	(\$1,360,083)	\$12,479,954	

Appendix A - Status of Recommendations and Savings

Rec #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	FWISD's Projected Five-Year Savings (Costs)	Comments
Chapter 4 Personnel Management						
29	Increase professional requirements for Human Resource administrators. p. 179	Complete	\$0	\$0	\$0	In November 2001, the superintendent and the board authorized the reorganization of the Human Resources Department. FWISD changed all human resources administrators' job descriptions to require specific human resources experience and expertise. Using these job descriptions, the district filled 13 positions in December 2001 and January 2002.
30	Define specific objectives and dates for the Human Resources strategic plan and begin producing status reports. p. 181	Complete	\$0	\$0	\$0	The Human Resources strategic plan is included in the 2002-03 District Educational Improvement Plan as a separate supporting imperative.
31	Streamline job description maintenance, and update job descriptions at least every three years. p. 183	Complete	(\$33,000)	(\$358)	(\$358)	In March 2002, the district purchased new software to expedite the update/maintenance of job descriptions in a timelier manner.

						An employee systematically updates all job descriptions and expects to complete a formal review by August 2003.
32	Develop performance measures and standard reports for the Human Resources Department. p. 184	Complete	\$0	\$0	\$0	The department developed several standard reports during the 2001-02 school year. Procedures ensure that campus level and central office staff receive needed reports on an ongoing basis.
33	Develop a procedures manual for the Human Resource department. p. 186	In Progress	\$0	\$0	\$0	The Human Resources Department is developing a procedures manual with January 2003 as the completion timeframe.
34	Institute a pay-for-performance system to reward exceptional performance. p. 194	In Progress	\$0	\$0	\$0	Human Resources has researched "pay-for-performance" plans. Although current financial constraints prohibited the district from implementing this type of plan in 2002-03, FWISD remains interested in implementing such a plan and will continue to stay abreast of research in this area. Without intervention from the

						Texas Legislature, financial constraints will become more severe in 2003-04.
35	Evaluate the cost of all procedural and policy changes. p. 195	Complete	\$0	\$0	\$0	The Compensation Department tracks the costs of promotions and upgrades on a weekly basis. The department presents each year's figures to the chief financial officer for budget purposes.
36	Include policies for promotions and seniority in the policy manual, and ensure that non-professional positions receive sufficient coverage. p. 196	Complete	\$0	\$0	\$0	Final board adoption of the updated Human Resources policies is scheduled for January 28, 2003. However, the Compensation Handbook, which is accessible to all employees, adequately covers promotional regulations.
37	Establish written policies on moonlighting payroll and monitor the time and money spent on processing moonlighting pay. p. 197	Complete	\$0	\$0	\$0	Human Resources and Payroll have established policies regarding moonlight payroll, which have been distributed to all payroll personnel throughout the district in 2002-03.
38	Implement a policy to eliminate positions not filled within nine months. p. 201	Complete	\$0	\$0	\$0	The administration implemented a modified version during 2002-03 requiring a department head or principal to justify

						the reason for a position remaining unfilled after a specified period of time but is reconsidering this policy.
39	Reduce the length of vacancies by shortening hiring cycle and conducting staff planning. p. 202	Complete	\$0	\$0	\$0	By limiting postings to 10 working days for the majority of all positions, the district has been able to fill vacancies more quickly. Human Resources' new posting procedure, implemented in December 2002, requires all postings be advertised once per week with an update sheet listing all open positions posted on the Human Resources Web site and distributed though the district's e-mail system. This will include the paperwork associated with posting each position separately, so vacancies will be filled more quickly. Staff has been notified of this change in procedure.
40	Track the effectiveness of individual recruiting initiatives. p. 203	Complete	\$0	\$0	\$0	Beginning in fall 2001, the district's log of staff recruiting trips linked individuals

						hired to particular trips. The appropriate staff analyzes this data to make appropriate adjustments to future trips.
41	Administer tests as part of the initial employment screening process. p. 204	Complete	\$0	(\$1,015)	(\$1,015)	The district now has software and supporting hardware to administer employment tests such as typing, 10-key, basic clerical skills and financial skills during the initial employment screening process.
42	Issue contracts only for positions requiring certification or permits. p. 207	Complete	\$0	\$1,060	\$5,300	Because of the board's philosophy on labor management, the district did not eliminate all contracts, but instead Human Resources and Legal Services consolidated 12 similar contract types into six. This change will not eliminate the issuance of contracts to those not covered by Chapter 21, TEC, but it will simplify the process.
43	Standardize format and common elements for performance appraisals of non-teaching staff. p. 209	Complete	\$0	\$0	\$0	In May 2002, the district redesigned all performance appraisal forms into a standard format, which it will begin using in 2002-03.

44	Provide mini-conferences to non-instructional supervisory personnel. p. 212					During September 2001, the Leadership Development Department assessed custodial training needs, developed teaching modules and conducted an academy for head custodians in October 2001. The Maintenance Department is continuing the mini-conference concept with head custodians. After the mini-conferences were in place, Leadership Development directed its attention to assess central office training needs, develop modules and publicize schedules. Currently, all supervisory employees can participate in the summer Leadership Academy as well as fall and spring mini-conferences.
	Chapter 4 Total		(\$58,000)	(\$2,313)	(\$6,073)	
Grand Total All Chapters		\$13,389,583	(\$1,360,083)	\$12,479,954		

Appendix A - Status of Recommendations and Savings

Rec #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	FWISD's Projected Five-Year Savings (Costs)	Comments
Chapter 5 Facilities Use and Management						
45	Develop a comprehensive long-range facilities master plan and update annually. p. 233	In Progress	(\$25,000)	(\$25,000)	(\$25,000)	In January 2002, the district contracted with Total Program Management (TPM)) to develop a district facilities master plan. In addition, FWISD has engaged a demographer to provide enrollment projections for each district planning area. The demographer will update enrollment projections on an annual basis. TPM will use these projections along with known facility needs to develop the facility master plan. Overall, this process will take two years to complete.
46	Develop five-year enrollment projections for all schools by grade level, and update the enrollment projections annually. p. 236	Complete	\$0	\$0	\$0	In February 2002, the Research and Evaluation staff completed five-year enrollment projections by school and grade level. Additionally.

						in March 2002 an outside consultant completed a second projection as part of redistricting.
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. p. 237	Complete	\$0	\$0	\$0	Staff is working with the company, Total Program Management (TPM), to provide the superintendent and board with monthly financial updates that show progress on various projects. TPM has assigned an individual to maintain the Web site.
48	Ensure that maintenance staff is not assigned to work on bond projects. p. 243	Complete	\$0	\$0	\$0	After the completion of the Edna Gladney project scheduled for January 2003, district maintenance staff will no longer be assigned to bond projects. If the district uses any maintenance staff for bond projects, through accounting codes the expenses must be charged to the bond rather than to the Maintenance Department.
49	Develop a pilot project to determine the effectiveness of outsourcing some maintenance	Complete	\$444,812	\$0	\$0	In fall 2002, the district outsourced some paint, refinish and repair of lockers and researched the

	functions to decrease cost and increase user satisfaction. p. 243					feasibility of outsourcing lawn care.
50	Purchase and implement a maintenance management system to assist the district in prioritizing and scheduling work and ensuring critical tasks are accomplished. p. 246	Complete	(\$65,000)	\$0	\$0	The Operations Management Department and Information Services Department examined four different systems and chose one developed internally. During summer 2002, the district tested the system, which is currently functioning.
51	Integrate the scheduling and assignment of the work of the maintenance buses with the maintenance work order system. p. 248	In Progress	\$0	\$0	\$0	Implementation of this recommendation depends on the full implementation of the work order system in Recommendation #50. The district has already shifted staff to the preventive maintenance teams. Work orders are compiled one week prior to the preventive maintenance teams' scheduled arrival on the campus. The work orders are completed in accordance with other designated repairs. A

						conference is held with the principal prior to the start of any work.
52	Develop a utility cut-off manual and distribute copies to maintenance staff. p. 249	Complete	\$0	\$0	\$0	In March 2002, the district developed a manual that describes emergency utility cut-off locations and procedures for each facility/building. Principals, lead custodians and other appropriate staff members have reviewed the manual and distributed it to staff.
53	Implement a preventive maintenance program that provides regularly scheduled reviews and repairs for all areas of facility maintenance. p. 250	Complete	(\$349,220)	\$0	\$0	The district currently has a PM (Preventive Maintenance) division within the Maintenance Department that provides regularly scheduled reviews and repairs (at each facility twice yearly). The Preventive Maintenance activities, provided in Exhibit 5-22 on page 250, are the responsibilities of various trades in the Maintenance Department. As a result of the September 2001 reorganization, the

						district tracks and documents Preventive Maintenance more effectively. This was achieved with existing resources.
54	Provide a comprehensive training program for the maintenance staff to improve effectiveness and productivity. p. 252	Complete	\$0	\$0	(\$10,000)	This training was one component of Recommendation #44. The district will continue to financially support the state-mandated training schedules of licensed positions in the Maintenance Department. Training needs of other departments will be determined, a training schedule developed, publicized and participants enrolled. The district conducted the first Academy in October 2001 for head custodians.
55	Apply the district standard of at least 20,000 square feet per custodian consistently across all campuses. p. 257	Complete	\$9,027,312	\$240,125	\$3,861,505	The district hired a consultant to evaluate the FWISD standard of square feet per custodian in January 2002. A close review of the square footage submitted to the Comptroller during the initial visit by the new deputy superintendent of

						<p>Operations Management and Human Services showed a substantial increase in the overall square footage as well as that of individual facilities. The deputy superintendent concluded that some buildings were excluded and that new bond additions (floors, wings, etc.) and some portable buildings were omitted as well. According to the district's new calculations, FWISD exceeds the recommended by only 35 custodians instead of the original 84. The district instituted a hiring freeze in February 2002, allowing staffing levels to remain constant despite three new schools opening in August 2002. In addition, the district did not hire replacements for 15 retiring employees. Through attrition and reassignments to new schools, the recommendation has been</p>
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						implemented. However, the calculated savings will not match because of the erroneous data originally supplied to TSPR.
56	Develop a comprehensive and mandatory training program for custodial staff. p. 259	Complete	(\$138,620)	\$0	\$0	This training was one component of Recommendation #44. The department has instituted regular in-service workshops for custodians. This comprehensive mandatory training program offers information on up-to-date procedures for safety, cleaning, use of equipment and time management as well as supervisory skills training.
57	Implement district policies regulating temperature controls and energy management software on a districtwide basis. p. 261	Complete	\$0	\$0	\$0	The district contracted with an energy management control system firm to install and replace controls on old and new equipment May 2002. District officials said the cost for the contract, \$180,000 the first year and \$200,000 for each following year, should be recouped by energy savings

						after five years. Therefore no costs or savings are shown.
58	Involve the energy management group in HVAC system selection. p. 262	Complete	\$0	\$0	\$0	The energy management group now selects all HVAC systems. A matrix of existing equipment and recommended replacement units/parts will serve as reference for district officials.
59	Evaluate the programs offered by SECO, and participate in the programs beneficial to the district. p. 263	Complete	\$0	\$25,900	\$150,000	In June 2002, the district contracted with Estes, McClure & Associates, Inc., Consulting Engineers, an authorized SECO contractor, to prioritize directions and use of the energy management budget; strategies for more efficient use of existing equipment; and a replacement schedule for older, inefficient equipment. The district estimates that savings developed in the plan, which was completed in September 2002, will be equal to or greater than any further investments.

	Chapter 5 Total		\$8,894,284	\$241,025	\$3,976,505	
Grand Total All Chapters			\$13,389,583	(\$1,360,083)	\$12,479,954	

Appendix A - Status of Recommendations and Savings

Rec #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	FWISD's Projected Five-Year Savings (Costs)	Comments
Chapter 6 Asset and Risk Management						
60	Perform annual internal audits of investment activities and quarterly reports. p. 274	Complete	\$0	\$0	\$0	In December 2001, the board and internal auditor modified the internal audit work plan to include reviews of the quarterly investment reports and audits of the investment process.
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	Complete	\$0	\$0	\$0	During the summer of 2002, the Budget Department began documenting the investment procedures and controls over the investments. These procedures emphasize authorization, segregation of duties and security controls.
62	Establish a task force to initiate a program to reduce workers' compensation program costs. p. 285	Complete	\$1,891,039	(\$200,000)	\$800,000	In September 2001, FWISD established a task force to develop a loss control program. The district also hired consultants and trainers to introduce the loss control program to employees. to train

						<p>supervisors on reporting requirements and to train employees on safety awareness and the proper way to perform tasks. The district hopes to achieve savings through a reduction in workers' compensation claims by 5 percent, which should more than offset the ongoing cost of this initiative.</p>
63	<p>Establish post-offer, pre-employment screening as a means of reducing workers' compensation claims and costs. p. 287</p>	Complete	\$494,181	\$0	\$0	<p>The second reading for board approval of proposed revisions to Policy DBB (Local) is scheduled for January 28, 2003. Estimated savings are combined with Recommendation #62.</p>
64	<p>Develop a districtwide safety manual. p. 288</p>	Complete	(\$5,000)	\$0	\$0	<p>In March 2002, the superintendent approved and distributed an Accident Prevention Plan. Trainers contracted as part of implementing Recommendation #62 will conduct the training. The costs and any savings are shown in Recommendation #62.</p>

65	Raise the fixed assets capitalization threshold to \$5,000 for assets accounted for in the Fixed-Asset Group of Accounts. p. 290	Complete	\$0	\$0	\$0	In June 2001, the board approved raising the fixed assets capitalization threshold to \$5,000 for assets accounted for in the Fixed-Asset Group of Accounts.
66	Modify the current inventory update process to more effectively use the automated system to update the fixed assets inventory. p. 292	Complete	\$0	\$0	\$0	With the implementation of GASB 34 during 2002-03, the district has changed the inventory update process for fixed assets using the AS400 CIMS Fixed Asset System.
67	Modify the inventory process to increase accuracy and timeliness of information. p. 293	In Progress	\$0	\$0	\$0	The district is reviewing the fixed asset process and developing procedures to improve the accuracy of the information stored in the fixed asset system. The district has completed a physical inventory and updated information, which is now available upon request. These new procedures will be finalized and implemented by August 2003.
	Chapter 6 Total		\$2,380,220	(\$200,000)	\$800,000	
	Grand Total All Chapters		\$13,389,583	(\$1,360,083)	\$12,479,954	

Appendix A - Status of Recommendations and Savings

Rec #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	FWISD's Projected Five-Year Savings (Costs)	Comments
Chapter 7 Financial Management						
68	Require all accrued expenditures be included in the final budget amendment presented to the board. p. 313	Complete	\$0	\$0	\$0	At the time of the review, individuals made purchases without first entering a purchase order into the system to encumber the funds, making it difficult at the end of the year to accrue expenditures. In June 2002, the CFO sent a memo to all personnel with purchasing authority, to reinforce adherence to the board policy requiring purchase order completion prior to ordering goods/services. Employees were notified that non-compliance would result in disciplinary action and that they could be held financially responsible. The district reemphasized the policy at monthly principals' meetings. The district now monitors noncompliance and

						requires explanations as well as deputy superintendent approval in noncompliance situations. Letters of concern and formal reprimands have been issued.
69	Provide mandatory training for all personnel responsible for monitoring a budget. p. 314	Complete	\$0	\$0	\$0	Beginning in 2001, the district will train new budget managers and existing secretaries at an annual July in-service workshop. The Budget Department also provides training throughout the school year for employees who have not had budget responsibility.
70	Implement a system of performance-based budgeting and invest in performance-based budget training for school district staff. p. 315	In Progress	(\$1,425)	(\$285)	(\$1,425)	District staff attended training on performance-based budgeting in April 2002. The Budget Department is determining the feasibility of this recommendation and the steps necessary to phase in this concept. The costs shown cover the training.
71	Require the grants coordinator in the Research and Evaluation Department to	Complete	\$0	\$0	\$0	In April 2002, the Research and Evaluation Department began drafting procedures

	approve all grants. p. 319					for all employees applying for any grants. Executive staff reviewed procedures prior to the finalization and distribution.
72	Use the Kronos timekeeping system for all district hourly staff. p. 320	In Progress	\$0	(\$145,000)	\$0	The district is evaluating proposals from time-keeping vendors. Based on funding availability, FWISD should purchase a system in the spring of 2003 and phase in system usage to eventually cover all hourly employees. The district expects that savings will offset initial costs in future years.
73	Establish and enforce a use policy for the Telecommunications Support System to reduce the manual data entry of payroll information. p. 322	Complete	\$0	\$0	\$0	With the exception of Food Service Department employees, the district will require employees to use the Telecommunications Support System beginning January 2003. Policy revisions to reinforce these requirements will be submitted to the board for first reading on January 14 and second reading on January 28, 2003. Food Service employees will be on-line by February 2003.

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	Complete	\$0	\$0	\$0	During 2001-02, the Accounting Department implemented a more efficient process for reviewing statements. The new process significantly reduces the time required to review internal finance fund bank statements, so the statements can be returned to the schools in a timelier manner. From the time the district receives the diskette from the bank, it reduced turnaround to two days for February, March and April of 2002.
75	Amend check-signing policies to streamline the disbursement process for internal finance funds. p. 327	Complete	\$0	\$0	\$0	In the spirit of the recommendation, when the principal or secretary is absent or unavailable, a designated individual will be allowed to sign checks. Checks for more than \$10,000 will require a third signature. This change was implemented in December 2001, and the district revised the manual in January 2002 and sent notices to each school.
76	Transfer the	Rejected	\$0	\$0	\$0	The revised

	operational responsibilities of the Internal Audit Department to the Accounting Department to maintain the independence and objectivity of the audit function. p. 331					standards, which became effective January 2002, expand the definition of internal auditing to include "consulting activity designed to add value and improve an organization's operations." Based on the revised standards, the district believes that audit independence and objectivity will not be affected, because the consultants are not involved in the audit process.
77	Create a board Audit Advisory Committee to advise the school board in matters pertaining to the district's internal audit functions. p. 332	Complete	\$0	\$0	\$0	The board revised a policy that created an advisory committee to advise the board regarding internal and external audit operations.
78	Restructure the Internal Audit Department to report directly to the board. p. 333	Complete	\$0	\$0	\$0	In December 2002, the board approved on first reading a revision to policy that would restructure the Internal Audit Department to report directly to the board through the board's Audit Committee.
79	Adopt a charter for the Internal Audit Department that details the	Complete	\$0	\$0	\$0	In August 2001, the board adopted a revision to a policy detailing the Internal

	department's purpose, authority and responsibility. p. 334					Audit Department's purpose, authority and responsibility. The policy now requires internal audits to be planned and conducted in accordance with the Institute of Internal Auditors' Standards for the Professional Practice of Internal Auditing.
80	Conduct an annual risk assessment to determine annual audit objectives and allocate audit hours accordingly. p. 335	Complete	\$0	\$0	\$0	The lead auditor developed a structured process for formulating the internal audit plan that includes an assessment of risks. The Budget/Audit Committee formally adopted the audit plan in December 2001.
	Chapter 7 Total		(\$1,425)	(\$145,285)	(\$1,425)	
	Grand Total All Chapters		\$13,389,583	(\$1,360,083)	\$12,479,954	

Appendix A - Status of Recommendations and Savings

Rec #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	FWISD's Projected Five-Year Savings (Costs)	Comments
Chapter 8 Purchasing and Warehouse Management						
81	Develop a process for monitoring purchasing procedures and enforcing the district's purchasing policies. p. 344	Complete	\$0	\$0	\$0	Effective the summer of 2001, the district enters the actual invoice date into the CIMS III system when paying invoices. From this information, the Accounting Department is able to identify areas of noncompliance.
82	Move the travel review process to the Accounting Department. p. 345	Rejected	\$0	\$0	\$0	The administration rejected this recommendation because staff members who are involved in the travel review process are the same as those who calculate the employee advances. These employees are the most familiar with the travel policies and circumstances surrounding the initial request. Additionally, the office layout of the Purchasing Department is conducive to the

						review process, and major modifications would be necessary if the review process were shifted to the Accounting Department.
83	Develop written procedures for district travel and provide training for employees. p. 346	Complete	\$0	\$0	\$0	The board approved a revised travel policy in February 2002, deleting some ambiguities and duplicate approvals. Travel information brochures will be distributed at in-service training during 2002-03.
84	Require departmental staff to process travel forms through the CIMS III travel system. p. 348	In Progress	\$132,230	\$0	\$0	The Information Services Department is determining the necessary program modifications and access provisions to the CIMS III Travel system. Once the decentralized system is operational, the district will consider eliminating the clerical position in Purchasing.
85	Actively participate in the Texas Cooperative Purchasing Network. p. 350	Complete	\$0	\$0	\$0	A member of the Texas Cooperative Purchasing Network since May 2000, the district also has interlocal purchasing agreements with

						TASB Buy Board, city of Fort Worth, Tarrant County and Region 4 and Region 11 Education Service Centers.
86	Establish a commodity code system and monitor purchases to ensure compliance with Texas purchasing laws. p. 351	In Progress	\$0	\$0	\$0	The district implemented a system that can be programmed internally. After Information Services has it operational by summer 2003, the system will run periodic reports. The Purchasing Department will review any exceptions to see if like items approach or exceed the bid threshold. In addition, the Purchasing supervisor will continue to review all purchase orders daily, and a second review of non-bid purchases by the entire Purchasing administrative staff will continue at weekly staff meetings.
87	Reduce the amount of office supplies stored in the Central Warehouse and maximize use of the just-in-time contract for	Complete	\$0	\$0	\$0	The district has analyzed office supply inventory cost and issue volume to determine which items are not cost-

	supplies. p. 356					beneficial to stock. As a result, the district has discontinued several items. The just-in-time program with Corporate Express that began in January 2002 and provides campus supplies within 24 to 48 hours will also help reduce supplies stored in the Central Warehouse.
88	Prepare a vehicle replacement schedule and budget for regular vehicle replacement. p. 357	In Progress	(\$175,000)	\$0	(\$300,000)	FWISD developed a delivery and maintenance vehicle replacement schedule in October 2001, but has not been able to implement the plan because of budgetary constraints.
89	Enforce district policy to require schools to reimburse the district for missing textbooks. p. 363	Complete	\$650,585	\$201,000	\$650,000	After a spring 2002 review, the Internal Audit Department discovered the schedule of amounts owed by each school for lost textbooks was unreliable. The Internal Audit Department performed textbook audits in conjunction with internal finance audits at selected schools and

						<p>developed a <i>Best Practices Report</i>. The district reduced previous amounts by 10 percent in most instances and conducted an accurate inventory at the end of 2001-02. Based on now-accurate records, schools will be required to reimburse the district for missing textbooks starting in 2002-03. In addition, the district segregated the textbook warehouse physically and managerially to increase control. The district calculated it will save \$174,000 in the future annually, but it has conservatively estimated only \$650,000 for five years to account for unforeseen changes.</p>
	Chapter 8 Total		\$607,815	\$201,000	\$350,000	
	Grand Total All Chapters		\$13,389,583	(\$1,360,083)	\$12,479,954	

Appendix A - Status of Recommendations and Savings

Rec #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	FWISD's Projected Five-Year Savings (Costs)	Comments
Chapter 9 Computers and Technology						
90	Increase ITS support staff by five positions. p. 375	Complete	(\$1,209,880)	(\$30,000)	(\$700,000)	After reviewing the Information Services Department, the chief information officer (CIO) recommended a department reorganization, which the board approved in July 2002. Prior to implementing the recommendations, the CIO examined the workflows and determined that moving field technicians out of the central office and to the campuses would increase each technician's daily productivity. The district has also contracted routine services to improve service levels. The changes resulted in quicker response to users, greater efficiency and a reduction of field technicians' backlog. With the reduction in work

						and the new distribution of field technicians, FWISD does not have an immediate need for additional staff. The amounts shown include the costs of outsourcing field repair work. Analysis of data from the new call tracking system (see Recommendation #91) will be used to justify positions as the need arises. The district has also outsourced routine service for administrative locations to this contractor.
91	Track all technology work orders and response times to improve department efficiency and effectiveness. p. 376	Complete	\$0	(\$30,000)	(\$30,000)	During July and August 2002, the district implemented the HEAT call tracking system and trained technology staff to use the system. The district enters calls, makes referrals and manages orders on the system. Field technicians have access to the trouble ticket system via the district intranet. The annual employee appraisal for field technicians

						will use completed call tickets as a performance measure.
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	In Progress	\$0	\$0	\$0	The CIO, in cooperation with key user groups, is developing a structured procedure to select, adopt and implement technologies within the district. The Technology Advisory Committee anticipates adopting draft procedures during the first quarter of 2003.
93	Update the district Technology Plan on an annual basis. p. 384	Complete	\$0	\$0	\$0	The board approved the updated technology plan in March 2002. The CIO and technical staff will perform an annual review to update the district's Technology Plan under the guidance of the district Technology Advisory Committee. The CIO will coordinate these efforts through a six-step process.
94	Pursue alternative sources of funds for technology capital	Complete	\$787,500	\$3,740,000	\$4,640,000	During 2001-02, as part of the overall district reorganization. the

	<p>expenditures. p. 385</p>					<p>superintendent transferred the grant coordinator from Research to report directly to the deputy superintendent. The CIO receives information from the grant coordinator concerning grant opportunities on a regular basis. FWISD succeeded in obtaining a \$3.7 million Technology Infrastructure Fund (TIF) grant during 2001-02, which the district will use for classroom technology. Additionally, the district is pursuing \$90 million in E-rate money for 74 schools with significant economically disadvantaged populations, which is not included in the five-year estimate. The CIO believes the district should be able to achieve a minimum increase in revenues equal to 1 percent of all technology-related funding or an additional \$225,000 per year. These estimates however</p>
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						are based on the existing grant programs, which may be discontinued considering the budgetary shortfalls at the state and national levels.
95	Finalize and implement the Disaster Recovery Plan. p. 386	In Progress	\$0	\$0	\$0	FWISD is reviewing and refining a Disaster Recovery Plan to be finalized in second quarter of 2003.
96	Develop and implement nightly back-up procedures for servers, and document back-up procedures for the AS/400. p. 387	Complete	\$0	\$0	\$0	In September 2001, the department initiated nightly server back-ups using LAN-based, DLT hardware and NovaNet Software.
97	Allocate instructional computers to schools based on desired student to computer ratios. p. 390	In Progress	\$0	(\$4,900,000)	(\$4,900,000)	As part its technology plan, FWISD has begun placing two computers and a printer in every K-12 classroom in the district. By January 2002, every classroom had the minimum standard computer and printer. The district will use TIF grants, the state's technology allotment and some general funds to fund this project. Maintaining this

						desired ratio will require replacement funding, which is not included in the estimated costs.
98	Incorporate instructional technology goals into the District Strategic Plan and develop performance measures to track progress. p. 393	Complete	\$0	\$0	\$0	The Information Technology and Instructional departments developed performance goals for the 2002-03 DEIP, which now includes technology training as part of the district's strategic plan.
99	Conduct an annual physical count of hardware inventory. p. 397	Complete	\$0	\$0	\$0	From January through March 2002, the subcontracted Dell Computers installing team inventoried existing and new computers and printers. The new Web-based inventory can search by location, type of computer and computer repairs.
	Chapter 9 Total		(\$422,380)	(\$1,220,000)	(\$990,000)	
	Grand Total All Chapters		\$13,389,583	(\$1,360,083)	\$12,479,954	

Appendix A - Status of Recommendations and Savings

Rec #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	FWISD's Projected Five-Year Savings (Costs)	Comments
Chapter 10 Transportation						
100	Establish a section within the Transportation Department dedicated to safety and training. p. 414	Complete	(\$178,385)	(\$35,677)	(\$178,385)	The board created a safety clerk position in November 2001 to keep safety and training records. The administration also modified the role of transportation training coordinator to include supervising the safety clerk, training staff and recruitment team.
101	Create two full-time and one part-time dispatcher positions at the Clark Field facility. p. 416	Not Implemented	(\$241,775)	\$0	\$0	The Transportation Department requested the addition of three full-time dispatchers to Clark Field bus lot; however, the request was denied due to budgetary constraints.
102	Provide an appropriate number of employees for routing and scheduling in the Transportation Department. p. 418	Complete	(\$761,686)	(\$72,000)	(\$561,095)	For 2001-02, the district added a scheduling clerk's position as well as a manager of route scheduling. The request for an additional position in 2002-03 was

						denied because of budgetary constraints.
103	Establish a target of 23 school buses per mechanic. p. 420	In Progress	\$1,126,345	\$0	\$225,269	The district plans to decrease the number of mechanics through attrition. During a four-year period, the district plans to achieve a ratio of 23 to 1, as recommended.
104	Implement a performance-monitoring program to measure accomplishments and identify areas for improvement. p. 423	Complete	\$0	\$0	\$0	The Transportation Department now provides data on: safety, cost efficiency, service effectiveness, quality maintenance performance and personnel management. Beginning in 2001-02, the department submits this report to the deputy superintendent every six months for review. The deputy superintendent uses these reports to monitor and adjust overtime, breakdowns, workers' compensation claims, staffing and absences rates.
105	Provide drivers and attendants a sensible.	Complete	(\$224,656)	(\$38,865)	(\$154,065)	In June 2002, the district provided each driver and

	comfortable uniform. p. 425					attendant with five shirts. Drivers are required to provide their own khaki pants or shorts.
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					FWISD uses routing and scheduling software to efficiently operate its buses and to schedule drivers. The software company provides support service to help the district maximize the routing and scheduling system's efficiency. The savings shown resulted from the reduction of four buses and costs for hiring new staff that the district avoided during the expansion of schools. The district is also creating a transportation satellite facility to reduce costs. Approximately 25 percent of the buses have already been moved to the new site. The projected savings from this move are not reflected in the \$3,549,865 shown because the actual
		Complete	\$2,697,759	\$709,973	\$3,549,865	

						amount remains speculative. At an estimated savings of \$157,805 for six months, the savings could be \$434,000 annually.
107	Implement the routing and scheduling software for special education. p. 431	Complete	\$1,587,568	\$34,010	\$170,050	As a result of the routing and scheduling software for special education, the district has been able to implement the one-hour and 15-minute maximum ride time limit during 2001-02. The district purchased additional lift buses at a one-time cost of approximately \$600,000, which is included in the total costs shown in Recommendation #109.
108	Expand the training program for new drivers to reflect the training curriculum recommended by the Texas Department of Public Safety (TDPS) and provide annual professional training for drivers. p. 434	Complete	(\$390,991)	\$0	\$0	The Transportation Department uses the training curriculum recommended by TDPS. Employees receive a 20-hour class through the Region 11 Service Center, which meets the TDPS curriculum requirement. FWISD provides

						additional training in excess of 30 hours specific to the needs of the district, which fully satisfies the TDPS curriculum requirements.
109	Revise the fleet procurement plan to replace buses annually based on miles operated, years of service and cost of maintenance. p. 438	Complete	(\$5,500,000)	(\$1,300,000)	(\$5,500,000)	The department developed a 15-year procurement plan based on miles operated and years of service. The board approved funding for 20 additional buses for special purposes and authorized staff to request bids for them. The district did not purchase an additional 28 buses because of budgetary constraints, but estimates costs over five years to remain at the level shown.
110	Maintain a spare bus ratio of 15 percent. p. 440	Complete	\$0	\$143,943	\$143,943	The district currently maintains a 14.4 percent spare bus ratio and will retain 52 older buses to meet the needs of the district and allow for adequate maintenance. Because the district is below the 15 percent recommended

						ratio, the total number of buses will increase to 428. In the last year, however, the district sold older buses for a net profit of \$143,943.
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	Complete	(\$6,000)	\$0	\$0	In August 2001, the district implemented a software program donated by International Bus that has a vehicle maintenance information system (VMIS). International Bus also donated the hardware; therefore, the district experienced no additional costs.
112	Investigate outsourcing parts supply and inventory management. p. 443	Complete	\$324,000	\$0	\$0	In December 2002, the district's consultant investigated outsourcing parts supply and inventory management. In addition, a consultant working with the district on other issues in the Maintenance Department reviewed this recommendation. After considering all information, district officials decided to continue

						the current practice.
113	Reward mechanics that achieve Automotive Service Excellence (ASE) certification. p. 446	Complete	(\$34,000)	(\$692)	(\$3,806)	The district employs 22 mechanics who still need to be certified. Each mechanic must take and pass seven tests to become a master technician. As an incentive for mechanics to complete training, the district will begin paying for the training in 2002-03.
114	Conduct a feasibility study for outsourcing student transportation and develop a Request for Proposals. p. 451	Complete	\$0	(\$5,000)	(\$5,000)	The district consultant conducted a feasibility study on outsourcing student transportation in December 2002. The consultant's report concluded that the fleet was in good condition, was professionally managed and did not recommend outsourcing student transportation at this time.
115	Continue efforts to encourage shared services with the Fort Worth Transportation Authority. p. 455	Complete	\$0	\$0	\$0	The district continues an ongoing dialogue with the Fort Worth Transportation

						Authority concerning the transportation of special needs students.
	Chapter 10 Total		(\$1,601,821)	(\$564,308)	(\$2,313,224)	
	Grand Total All Chapters		\$13,389,583	(\$1,360,083)	\$12,479,954	

Appendix A - Status of Recommendations and Savings

Rec #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	FWISD's Projected Five-Year Savings (Costs)	Comments
Chapter 11 Nutrition Services						
116	Hire permanent floater employees to fill absent positions. p. 463	Complete	\$1,457,005	\$0	\$1,290,665	In January 2002, Child Nutrition Services added and filled 30 permanent floater employee positions.
117	Evaluate the warehouse and maintenance operations annually to determine what portion of costs are attributable to Nutrition Services. p. 467	Complete	\$0	\$0	\$0	The district's evaluation, conducted in September 2001, indicates that the Nutrition Services budget supports 100 percent of the salaries for five warehouse and maintenance operations employees. Although it has not yet been used, the district has a mechanism in place if any of these employees work for other departments. In these events, the district will bill the user departments for the time the employees worked.
118	Implement the automated payment feature for meals. p. 468	Complete	(\$21,860)	(\$44,664)	(\$44,664)	The Child Nutrition Services Department purchased keypads for all remaining

						elementary school sites at a cost of \$44,664. All middle schools and high schools, upper elementary grades and lower grades are using the automated keypads.
119	Request the City of Fort Worth Health Department to inspect all FWISD school cafeterias on an annual basis. p. 469					<p>The district asked the city to begin inspecting school cafeterias in September 2001. Both the city and county charge to inspect the school cafeterias. After evaluating city and county services and costs, the district initiated an agreement with Tarrant County Environmental Health Department starting in September 2002. The county was more economical and exercised more flexibility concerning assessments and time constraints for repair. The projected costs include the inspections and for ensuring facilities compliance with codes. Two visits per year are scheduled.</p> <p>Annroximately 55</p>
		Complete	\$0	(\$31,160)	(\$81,900)	

						on-site food safety inspections had been completed on December 2, 2002.
120	Establish rules to control competitive food sales as required by the Child Nutrition Program. p. 471	Complete	\$86,990	\$0	\$0	For 2001-02, the district has developed rules to control competitive food sales in school cafeterias during meal times consistent with state and federal guidelines. The board policy complies with the TEA guidelines for competitive food sales in school cafeterias (under the Federal Lunch Program Guidelines). The savings directly attributable to this policy are included in overall savings shown in Recommendation #121.
121	Increase student meal participation in FWISD cafeterias. p. 473	Complete	\$32,668	\$500,000	\$2,500,000	District administrators said that pilot programs, marketing plans and new products tested by students have contributed to the sales increase of Type A lunches, which exceeded 1 million for the month of April 2002. Overall lunches have increased by about

						1,200 per day.
122	Eliminate the duplicative entry of Nutrition Services financial data into the district's main accounting system. p. 479	Complete	\$0	\$0	\$0	The electronic monthly submission by Nutrition Services to the Accounting Department for reconciliation beginning in October 2001 has eliminated the duplicative entry of financial data.
	Chapter 11 Total		\$1,554,803	\$424,176	\$3,664,101	
	Grand Total All Chapters		\$13,389,583	(\$1,360,083)	\$12,479,954	

Appendix A - Status of Recommendations and Savings

Rec #	Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	FWISD's Projected Five-Year Savings (Costs)	Comments
Chapter 12 Safety and Security						
123	Develop a comprehensive long-range districtwide safety and security plan that includes performance measures. p. 492	Complete	\$0	\$0	\$0	Student Affairs, in collaboration with other stakeholders, developed a long-range safety and security plan for 2002-03. As recommended, the plan includes performance measures and forms for reporting progress.
124	Implement procedures to include SSI officers' input on safety reviews and initiatives, incorporating their response into district planning and decision-making. p. 494	Complete	\$0	\$0	\$0	The executive director of Student Affairs met with the School Security Initiative Committee to develop the School Safety Assessment in October 2002, which elementary and secondary school management approved in October 2002. The results of the assessment will be distributed to district personnel annually. Campuses use this information to assess and correct

						the condition of safety equipment, signage and existing hazards on grounds and in buildings.
125	Develop a maintenance and phased-replacement plan for security equipment. p. 495	Complete	(\$250,000)	(\$50,000)	(\$250,000)	FWISD area advisors complete a security equipment inventory at a minimum of once per semester. The vendor and trained district employees provide regular maintenance on security equipment. The department has included an annual replacement schedule in the 2002-03 budget.
126	Discontinue use of area advisor vehicles and implement automobile allowances. p. 496	Rejected	\$22,396	\$0	\$0	The area advisors respond to calls for service at all district schools and are routinely required to transport students and perform a variety of other functions. District administrators said that if the district required employees to use their personal vehicles, there would be a clear and present liability hazard. In addition, administrators said the visibility of the district cars serves as a deterrent to

						crime.
127	Eliminate dispatcher overtime by varying the shift schedules for backup secretaries. p. 498	Complete	\$19,610	\$3,922	\$19,610	The day after the TSPR report was released in May 2001; the district implemented a flex schedule for the dispatchers to eliminate overtime costs. In addition, secretaries and other staff were cross-trained to allow flexibility when someone was off.
128	Develop computer reporting forms and electronic routing to collect, evaluate and report performance measurement and other safety management information efficiently. p. 502	Complete	\$0	\$0	\$0	During summer 2002, staff members developed an <i>Incident Report</i> for submission to the CIO. Because the district could not find software to fulfill its needs, the district decided to develop the system in-house.
129	Develop a policy to incorporate Crime Prevention Through Environmental Design (CPTED) principles into all new construction and renovation projects. p. 503	Complete	\$0	\$0	\$0	The board approved a policy in fall 2002 developed by the executive director of Student Affairs, in collaboration with other district officials that serves as a guideline for incorporating CPTED principles into new construction and/or renovations.

130	Adopt consistent districtwide emergency warning signals. p. 506						In August 2001, FWISD printed and distributed a revised Emergency Flip Chart, which included consistent, districtwide emergency warning signals. The district will review this chart annually. During summer 2002, the Maintenance Department instructed personnel on every campus on how to reset the bell systems so that appropriate bells would sound for each emergency type.
		Complete	\$0	\$0	\$0		
131	Enforce the dress code for campus monitors so visitors can easily identify them. p. 507						In spring 2002, Student Affairs staff met with principals and campus monitors to discuss the importance of following and enforcing the dress code. Also; the district purchased shirts and hats for each monitor to ensure compliance. The department conducts unannounced visits to ensure campus enforcement of the dress code policy.
		Complete	\$0	(\$36,000)	(\$140,000)		
132	Expand the campus	Complete	\$0	\$0	\$0		The administration

	<p>monitor training curriculum and develop training materials for principals regarding campus monitor roles, responsibilities and duties. p. 507</p>					<p>developed a <i>Campus Monitor Handbook</i>, which it distributed in fall 2001 to each school principal. As recommended, the Office of Student Affairs expanded the training curriculum in 2002 to include the roles and responsibilities of the campus monitor.</p>
133	<p>Design and implement a consistent districtwide identification system for students, staff and visitors. p. 510</p>	Complete	\$0	\$0	\$0	<p>The district implemented a districtwide identification system as recommended beginning in March 2002. Each school has visitor/volunteer sign-in books. The district made photo ID badges for authorized school volunteers. Other visitor badges, with spaces for name and date, were made available to campuses in fall 2002. Non-instructional employees, such as maintenance, have new, uniform photo ID badges. In October 2002, the district provided all central office staff</p>

						with photo ID badges.
134	Place clearly visible signs at all entrances directing visitors to the office for sign-in. p. 511	Complete	(\$12,000)	\$0	\$0	In August 2002, Student Affairs staff worked with principals to place the appropriate number of visitor signs to provide clear visibility and directions.
135	Align the oversight responsibilities for all alternative education programs under the director of Alternative Schools. p. 519	Complete	\$0	\$37,000	\$185,000	FWISD replaced all contract alternative education programs with district sites under the supervision of the director of Alternative Schools. The savings shown result from discontinuing those contracts and offering the programs with in-house staff.
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	Complete	\$0	\$0	\$0	In February 2002, the district formed a Discipline Stakeholder Committee to determine the best practices implemented at schools. The planning principals from each feeder pattern helped identify the best practices. The committee analyzed data from

						Student Affairs on discipline referrals and from Information Services on attendance. The district used the information during new administrator training and disseminated it to all campus level administrators in fall 2002. Best practices are posted on the district's "First Class" e-mail system.
	Chapter 12 Total		(\$219,994)	(\$45,078)	(\$185,390)	
	Grand Total All Chapters		\$13,389,583	(\$1,360,083)	\$12,479,954	