

January 15, 2002

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

Fellow Texans:

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

In August 2000, I released the results of my review of the district's operations. This review offered 60 recommendations that could save BISD taxpayers nearly \$4.6 million by 2004-05. Cumulative net savings from all recommendations (savings less recommended investments) were projected to reach \$3.9 million by 2004-05. The review also noted a number of BISD's exemplary programs and model services provided by district administrators, teachers and staff.

After a little more than one year, we returned to check on how well the district's leadership put these proposals into practice. Over the last year, BISD has implemented, or is in the process of implementing, 55 of the proposals, or 92 percent. The district has realized net savings of \$476,132 to date and expects those savings over five years to reach nearly \$2 million.

This report is available on my Web site at [www.window.state.tx.us/tspr/bastroppr/](http://www.window.state.tx.us/tspr/bastroppr/).

Thanks for all that you do for Texas.

Sincerely,



Carole Keeton Rylander  
Texas Comptroller

# Introduction

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

Since 1991, TSPR has recommended more than 5,500 ways to save taxpayers more than \$600 million over a five-year period in 63 different public school districts throughout Texas. TSPR also conducts follow-up reviews of districts that have had at least one year to implement recommendations. These 40 subsequent reviews show that almost 90 percent of TSPR's combined proposals have been acted upon, saving taxpayers more than \$109 million, with the full savings estimated to grow in the future.

## Improving the Texas School Performance Review

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

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

Recognizing that only about 52 cents of every education dollar is spent on instruction, Comptroller Rylander's goal is to channel more of every education dollar into the classroom. In addition, the Comptroller has acted to ensure that school districts' best practices and exemplary models will not be left buried inside individual TSPR reports. Instead, Comptroller Rylander has ordered best practices and exemplary programs to be shared quickly and systematically among all the state's school districts, and with anyone who requests such information. There is simply no reason for a district that has solved a problem to keep the solution to itself. Comptroller Rylander has directed TSPR to serve as an active clearinghouse of the best and brightest ideas in Texas public education. Best practices identified in the original review of BISD are included in the Comptroller's best practices database, "*A+ Ideas for Managing Schools*" (AIMS), which is accessible on the web at [www.aimsdatabase.org](http://www.aimsdatabase.org).

Under Comptroller Rylander'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 options to address core management challenges;

- ensure administrative activities are performed efficiently, without duplication and in a manner that spurs education;
- develop strategies to ensure the districts' processes and programs are continually assessed and improved;
- understand the 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 Rylander has opened her door to Texans who share her optimism about TSPR's potential. Suggestions to improve school reviews are welcome at any time. The Comptroller is a staunch believer in public education and public accountability.

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

## TSPR in the Bastrop Independent School District

In January 2000, when Comptroller Rylander announced the Bastrop ISD review, the district was suffering from a loss of confidence among some community members in its ability to adequately manage its financial affairs. Several months before the announcement, more than 120 community members had signed and submitted a petition to the Comptroller asking for a review of the district.

Based upon more than five months of work, this report identified BISD's exemplary programs and suggests concrete ways to improve district operations. If fully implemented, the Comptroller's 60 recommendations could result in net savings of more than \$3.9 million over the next five years.

The Comptroller's office selected WCL Enterprises, a consulting firm based in Katy, Texas, to assist the agency with this review. The TSPR team interviewed district employees, school board members, parents, business leaders and community members and held a community meeting in BISD's Intermediate School. To obtain additional comments, the review team conducted focus group sessions with parents, teachers, principals, business leaders and representatives from community organizations. The Comptroller also received letters from a wide array of parents, teachers and community members, and staff received calls to the Comptroller's toll-free hotline.

Ninety-six campus and 34 central administrators and support staff; 31 principals, assistant principals and professional support staff along with 187 teachers completed written surveys as part of the review. 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).

BISD selected peer districts for comparisons based on similarities in student enrollment, student performance and community and student demographics. The selected peer districts were Brazosport, Del Valle, Georgetown, Hays, Lockhart, San Marcos and Schertz-Cibolo. TSPR also compared BISD to

district averages in TEA's Regional Education Service Center XIII (Region 13), to which BISD belongs, and to the statewide average as a whole.

## **Bastrop ISD in Profile**

Bastrop ISD is the largest of four districts located in Bastrop County, which is approximately 40 miles east of the city of Austin. The district has one high school, one middle school, one intermediate school, one middle/intermediate school, four elementary schools and three alternative education campuses for secondary students for a total of 11 campuses. Enrollment for 2001-02 is 6,753 students.

In 2001-02, BISD's student enrollment is 30.6 percent Hispanic, 57.8 percent Anglo, 10.5 percent African American and 1.1 percent "Other." More than 44 percent of BISD's students are classified as economically disadvantaged.

In 2000-01, TEA awarded BISD an Academically Acceptable rating, and Bastrop Middle School received a Recognized rating.

In 2000-01, 89 percent of all students passed the reading portion of the Texas Assessment of Academic Skills (TAAS), about 91 percent passed the math portion and about 90 percent passed the writing portion. The district achieved improvements in nearly all categories and in all subcategories of students taking the math and reading sections, but student performance declined on the writing portion of the exam from 1999-2000.

In 2000-01, the district employed a staff of 950 employees, with teachers accounting for 480 or nearly 51 percent. The district had expenditures of nearly \$43 million in 2000-01. In 2000-01, almost 38 percent of BISD's revenues were generated through local taxes, about 5 percent came from other local and intermediate sources and almost 55 percent came from the state, while less than 3 percent came from the federal government.

BISD spent 47 cents of every tax dollar on classroom instruction in 1999-2000. By 2000-01, that figure increased to slightly more than 49 cents of every tax dollar compared to the state average of 52 cents.

Since the time of the original review, BISD has completed an administrative reorganization of the district that has resulted in the elimination of a previous deputy superintendent. This change reduced the district's overall administrative costs, but still allowed the district to perform its administrative functions.

While the district still has a lot of work to do, both BISD staff and TSPR team members have a sense of steady progress. Thirty-three recommendations have been implemented, 22 are in various stages of progress and four have not been addressed. BISD officials rejected one recommendation because they believed implementation was not feasible at this time. (See Appendix A for details on the recommendations' status.)

## Bastrop ISD Report Card

Chapter	# of Recommendations	Complete	In Progress	Not Implemented	Rejected	Percent Complete/In Progress	Rating
District Organization and Management	6	2	4	0	0	33%/67%	Satisfactory
Educational Service Delivery	6	2	4	0	0	33%/67%	Satisfactory
Personnel Management	7	4	2	1	0	57%/29%	Satisfactory
Facilities Use and Management	5	3	2	0	0	60%/40%	Satisfactory
Financial Management	4	3	1	0	0	75%/25%	Satisfactory
Asset and Risk Management	5	2	1	1	1	40%/20%	Needs Work
Purchasing and Warehousing Services	7	5	1	1	0	71%/14%	Satisfactory
Child Nutrition Services	7	5	2	0	0	71%/29%	Satisfactory
Transportation	5	0	4	1	0	0%/80%	Satisfactory
Computers and Technology	8	7	1	0	0	88%/13%	Excellent
<b>Overall Grade</b>	<b>60</b>	<b>33</b>	<b>22</b>	<b>4</b>	<b>1</b>	<b>55%/37%</b>	<b>92%</b>

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

BISD is a school district with some notable successes, and TSPR has identified numerous “best practices.” Through commendations in each chapter, this report highlights model programs, operations and services provided by BISD administrators, teachers and staff members. Other school districts throughout Texas are encouraged to examine these exemplary programs and services to see if they could be adapted to meet local needs. TSPR’s commendations from the original report with italicized updates are listed below.

- BISD’s strategic planning process provides direction and focus in helping to achieve the district’s mission of improving the academic performance of all students. BISD has six long-range goals, adopted by the board, that form the basis for developing the district’s annual strategic plan objectives and implementation strategies. Since 1998, the district has annually revised its strategic plan goals and implementation strategies to reflect the progress of accomplishing previous objectives.

*Over the last year, BISD has been involved in an extensive long-range planning program that involved over 50 citizens from across the community. After nine months of meetings, the committee completed five and ten-year master plans that included demographic, facilities and cost information.*

- BISD provides information to its public often and in a variety of ways. The district publishes a district newsletter seven times annually and mails it to all addresses in the district; it prepares a weekly column for the local newspaper, which features information about events held at various schools and always includes pictures of students involved in school activities. The district regularly prepares press releases on various topics of interest to the community and it secures the contribution of billboards in the area to advertise for volunteers and partnerships. Actions of the school board are summarized in a publication distributed to all district employees.

*Bastrop ISD continues to look for ways to improve communication with the public. BISD has upgraded the district’s Web page to include information such as press releases, breakfast and lunch menus, board briefings, a community education brochure along with district facilities and athletics calendars.*

- Students at Bastrop Intermediate, Cedar Creek Elementary, Emile Elementary and Hill Street Elementary schools met performance standards for the Texas Successful Schools Awards System (TSSAS) and earned cash awards for their schools. TSSAS awards are given to schools considered to be performing well in comparison to peer schools. Schools qualify for cash awards by meeting two criteria. First, the school must meet standards for one of three ratings categories: exemplary, recognized or acceptable. Second, the school must rank in the top 25 percent of all

campuses that are in the same unique comparison group statewide, with respect to the Texas Learning Index. In February 2000, BISD received \$12,622 as part of TSSAS.

*BISD used money from the successful schools award program to purchase instructional supplies. In 2001, BISD received awards in the Successful Schools Awards Program at the following schools: Bastrop High School for reading, Mina Elementary for reading and Bastrop Intermediate School for math. BISD also received awards for its migrant program. At the Texas Migrant Education Conference, the district received recognition for the identification and recruitment of migrant students and was named All State for the 2000 and 2001 conferences. In addition, Mina Elementary School was recognized as Acknowledged and Cedar Creek Elementary was recognized as Excelling for migrant achievement on the 2000-01 TAAS.*

- BISD uses cooperative arrangements for providing services that would be costly for a small district to offer, such as special education services, alternative education activities and property tax collections. For example, BISD is the managing and fiscal agent for the Bastrop County Special Education Cooperative (BCSEC). BCSEC serves students with disabilities in four area school districts: Bastrop, Elgin, Smithville and LaGrange. The cooperative offers a wide variety of education services and settings to meet individual educational needs of students with disabilities. Many students with disabilities use the same curriculum and assessment as regular program students. Special services or modifications are provided to all students who require them in order to benefit from their educational program. Individual plans are based upon a comprehensive individual assessment that identifies a student's strengths, weaknesses and special needs.

*As of 2001-02, BISD continues to maintain and participate in the Bastrop County Special Education Cooperative.*

- BISD's Print Shop provides a quality, cost-effective service to the schools. While some printing such as school letterhead and envelopes, some handbooks and certificates and some administrative brochures and folders, are contracted to outside vendors, the district's Print Shop still prints more than four million copies of various school documents per year for the schools and departments. The cost per image is approximately \$0.026. Recent bids show the district would spend about \$0.038 per image to contract out this type of printing. The schools are receiving good value with an average charge-back of \$0.010 per image, including the cost of paper.

*BISD's Print Shop continues to provide quality service to the district that remains the lowest cost option for BISD.*

- The Food Services Department employees and managers measure performance based on job performance descriptions and employees are directly involved in the process through self-evaluations. The department manager and cafeteria managers evaluate each employee using performance-based and job-specific descriptions. Each employee and manager performs a self-evaluation using the job description form for presentation to the respective manager. The employee and manager determine the final evaluation score. The manager uses the evaluation to

pinpoint areas for improvement and further training and areas in which competency and/or proficiency has been achieved.

*In 2001-02, the BISD Child Nutrition Services Department is continuing its policy of employees and managers conducting performance-based job descriptions. Each employee continues to be involved and aware of his/her role in the evaluation process.*

- The Food Services manager uses sound fiscal management decision-making about expenses and revenue enhancements. The cafeteria managers are knowledgeable about financial information and have trained additional staff to assist in record keeping. This allows the department to maintain financial responsibility.

*BISD has improved its financial tracking of food service operations by adding tools such as meals-per-labor-hour worksheets and by adding greater detail to departmental profit and loss statements.*

- BISD receives additional revenue by providing vehicle fueling and maintenance services for Bastrop County and fueling services for the City of Bastrop through an interlocal agreement. Under the agreement, BISD provides the county 24-hour access to its underground fuel storage tank for \$3 per vehicle per month. This fee reimburses BISD for administrative and pump maintenance costs. The district also performs maintenance and repair services for county vehicles at a rate of cost of the parts plus 5 percent. BISD processes all the paperwork and bills the county. The county pays for their share of the fuel, including applicable taxes, when the fuel is delivered and it is billed directly by the fuel vendor.

*In 2001-02, BISD continues to provide services to the City of Bastrop and Bastrop County and receives revenues for vehicular fueling and maintenance services.*

- BISD aggressively involves business and community organizations to enrich all schools with in-kind contributions and financial support. The district has developed relationships with organizations such as the National Guard and Austin Community College to support its technology infrastructure development. BISD has received approximately a quarter of a million dollars worth of equipment for the distance learning lab project from the National Guard. The National Guard provided all of the setup and installation, and will conduct training sessions to BISD staff as well as provide all of the support and maintenance during this project. BISD students will not incur charges for the use of the distance learning lab or for college coursework during the day. The district is still working with ACC and other institutions of higher learning to determine a possible charge for evening use of the lab.

*BISD benefits from its relationships with the National Guard and Austin Community College. These community partnerships continue to provide financial support and volunteer assistance to enhance the district's technological infrastructure.*

## TSPR Key Recommendations

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

## **District Organization and Management**

**Recommendation 2: Use the District Improvement Plan (DIP) as the designated BISD strategic plan and integrate all other plans into the DIP.**

**Recommendation 3: Revise the District Improvement Plan (DIP) to include all functions of school district operations.**

**Recommendation 4: Tie allocation of resources to the District and Campus Improvement Plans (CIPs).** BISD administration believes recommendations 2, 3 and 4 have dramatically affected the district's organization and planning. The timeline for Campus and District Improvement Plans has changed to align resources to the fiscal budget planning calendar. District administrators said that students will benefit from integrating the various plans with the DIP. The DIP will encompass four broad-based goals and go before the board in spring 2002 for approval.

**Recommendation 5: Reorganize BISD operational functions to fully use all senior management positions.** The district completed a reorganization that resulted in eliminating the position of a deputy superintendent. This change has allowed the district to achieve savings, which frees up funds for classroom instruction. The district administration predicts the reorganization of senior management positions will save BISD nearly \$263,000 by 2004-05. BISD administrative staff members also are undergoing management training to enable them to work together as a team.

## **Educational Service Delivery**

**Recommendation 9: Develop a formal program evaluation process, clearly define roles and responsibilities and provide trained staff to lead the program.** The district has developed a formal program evaluation process to provide a framework for systematically evaluating instructional and support programs based on data-driven decision making in the areas of leadership, planning, student/stakeholder focus, faculty/staff focus, process management and results. The process has led to changes in libraries, counselors and transportation along with the entire hiring process. Non-value-added steps to the process for hiring teachers have also been removed.

## **Personnel Management**

**Recommendation 14: Eliminate central office interviews for teacher applicants.** As a result of the TSPR review, district officials have given principals the main responsibility for interviewing new teachers. Principals now have access to teacher applications online so they can select which applicants they want to interview for a vacant position.

## **Facilities Use and Management**

**Recommendation 21: Convert either Mina Elementary School or the West Campus of Bastrop High School to offices for district administration and for the special education cooperative.** In fall 2000, BISD chose to convert Mina Elementary School into a central administrative facility. Moving forward with this recommendation has improved community relations as the location of the current Central Administrative facility was the catalyst for a petition sent to the Comptroller requesting the initial school performance review. Construction is scheduled for completion by September 2002.

**Recommendation 20: Develop a long-range facilities master plan.** District administrative officials agreed that developing a facilities master plan was the most difficult recommendation to implement and was extremely labor intensive. However, BISD administrators told TSPR staff they are happy with the results of the facilities master plan and that it gives them a firm grasp on the district's facility needs. By knowing the current status of each facility, the district can make more informed decisions about future facility needs and usage, as well as needed repairs and renovations. The district is using the results of the long-range facilities master plan to call for a \$119 million bond election in February 2002.

## **Financial Management**

**Recommendation 26: Contract with an external audit firm to perform annual internal audits.** District administrative officials believe this recommendation gave them the confidence and permission to hire an outside firm to look at financial issues. The district has contracted with a private firm to audit the activity funds for spring 2002. The cost to the district is reduced by waiting until spring, and BISD administrators have said the audit will be conducted annually. By thoroughly investigating the optimal time to contract for an audit, BISD forecasts that over five years, the district will pay almost \$19,000 less than TSPR's original prediction.

**Recommendation 28: Contract for organizational consulting services to make the payroll process more efficient.** BISD administrators think that they learned a great deal from the review team about the payroll process. While BISD did not hire a consultant, the spirit of the recommendation has been completed by making the payroll process more efficient. As of 2001-02, the Business Office and payroll consists of four specialists, down from six in the previous year. The district transferred one employee to Personnel and eliminated one position. District officials say this recommendation will save BISD nearly \$136,000 over five years, exceeding TSPR's original estimate of \$81,000.

## **Asset and Risk Management**

**Recommendation 32: Streamline the fixed assets record keeping process.** Streamlining the fixed asset record keeping process has helped the district to improve the district's control of its inventory, and all fixed assets are now tied to the general ledger.

## **Purchasing**

**Recommendation 34: Establish a procedure to ensure compliance with all state and local purchasing laws and policies.** BISD has updated its purchasing manual for 2001-02, and the manual now complies with state and local purchasing laws.

## **Child Nutrition Services**

**Recommendation 44: Eliminate operational barriers and implement new programs to increase meal participation.** According to district administrators, implementing this recommendation made significant sense financially. The district has begun using family application forms to identify students eligible for free and reduced-price meals. BISD also has made all meals eligible for federal reimbursement or a la carte choices. The district tripled its participation rate for reimbursable meals, which will generate an additional \$100,000 in revenue. Children who are eligible for free meals can now obtain snack bar items without being identified as economically disadvantaged.

## Transportation

**Recommendation 49: Purchase automated bus routing software.** While the final outcome is yet to be determined, district administrators are obtaining demonstrations from vendors and collecting information on the latest software. The funds for an automated system are available in the current budget. BISD is planning to present its recommendation to the board in late January 2002 in the hope of a spring 2002 implementation. BISD administrative officials believe this purchase will improve customer service.

**Recommendation 48: Set up a procurement card to purchase inventory as needed and reduce present inventory levels for transportation parts by 40 percent.** The district has not implemented a procurement card system, but the district has instituted particular internal controls that allow the Transportation Department to accurately track the status of its inventory. BISD officials report that implementing this recommendation has streamlined the purchase process, reduced inventory and offered a computerized system that monitors inventory levels. The district has also disposed of parts that were occupying inventory space on vehicles the district no longer owns. The district also is using a bar-code reader to ensure an accurate automated inventory count.

## Computers and Technology

**Recommendation 57: Develop a core group of teachers that are successfully using technology as a resource for other teachers.** Intel trained three teachers in BISD in how to use technology, and those three teachers have been training additional educators, which should bring the number of trained teachers to 30. BISD officials hope by summer 2002 about 200 of the 500 teachers will be fully trained in additional technology. District officials believe implementing this recommendation will be an excellent way to educate teachers about technology in an environment where they will feel comfortable, and at a minimal cost to the district. Teachers are trained on their own time at no cost to the district other than that of the facilitator's salary.

## What Remains to be Done?

BISD has made steady progress in implementing TSPR recommendations. Ninety-two percent of the TSPR recommendations either have been implemented or are being implemented. District administrators have rejected one of the report's recommendations and have provided their reasons for their delay or inaction on 4 others. This section addresses the key areas requiring additional attention.

## Personnel Management

BISD administrators and board members have deferred action on Recommendation 15 for a controlled retirement incentive plan, stating that they were concerned about losing some of their best educators. An incentive plan, however, does not necessarily restrict the district from re-employing a retired participant to the extent permitted by the TRS rules of employment. Consequently, if a large number of experienced teachers accepted the offer, the district would be able to rehire or contract with some of them, perhaps with more flexible schedules to encourage their continued involvement in the education of children and mentoring of less experienced teachers. TSPR, therefore, encourages the district to carefully reconsider all aspects of an incentive plan against the possible negative impacts, and fully understand the legal and management issues surrounding such a plan.

## **Asset and Risk Functions**

The district has not been able to realize the full benefits of Recommendations #29 and #30 because the local banks do not offer overnight sweep accounts or controlled disbursement accounts. However, the local depository is working with BISD officials to update its services. In the Galveston ISD, TSPR found that a similar recommendation has had an effect on local area businesses as well as the district's interest earnings. Moody Bank, Galveston ISD's depository, did not offer overnight investments to its customers. GISD's business manager approached the bank with this recommendation and together they worked through the details. Now, GISD has earned an additional \$40,000 in interest, and Moody Bank is offering the service to its other customers. With encouragement from BISD officials, TSPR hopes that the local banking community will respond with improved services that can and will benefit all local area businesses.

## **Energy Management**

While BISD has taken advantage of an audit provided by the Comptroller's State Energy Conservation Office, and Recommendation #24 is marked complete since the audit is done, the real benefit of the audit remains to be tapped. The retrofits needed to achieve the energy savings are substantial, and in the coming months the board will be asked to make some hard decisions about making these investments. Due to rising energy costs, it is important that steps be taken immediately to ensure that the district conserves energy and keeps its utility bills to a minimum. In addition to the costly retrofits, there are also a number of simple things that can be done to conserve energy, including campus-based programs that educate students and staff in the importance of turning off lights and turning down thermostats. The Comptroller's State Energy Conservation Office and TSPR stand ready to assist BISD with this important work.

## **BISD'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 Bastrop 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 districts told TSPR they needed help in getting started. As a result, the reports now include implementation strategies and timelines to complement the recommendations. Districts have told TSPR these blueprints are invaluable to achieving the desired results. But it is important for TSPR to be mindful of those things that did not work as intended so the review process can be improved.

Bastrop ISD administrators and board members said the report was valuable because it forced the district to take a hard look at itself. Through this critical examination, the district was able to identify and implement many improvements.

Bastrop administrators and board members made the following observations:

According to district administration, the review created a lot of labor intensive work for the district. However, the popular consensus was that the review was worthwhile. The superintendent said the review would be useful for the district in years to come. One person said many of the recommendations highlighted things district personnel knew needed to be done, and the report gave them the impetus to get them accomplished. Without the review, the board and administration eventually might have addressed many of the problems uncovered in TSPR's report, but they said the review helped BISD achieve a great many improvements in a very short time.

One board member agreed the performance review fairly portrayed the exemplary programs and practices as well as the challenges facing the district. The same member also added that the public's opinion of the district has improved since the review.

As with any complex process, some things could have been performed better. The Child Nutrition manager and district administration did not believe that the sanitation issues in district kitchens highlighted in Recommendation #47 were presented properly to the public. BISD officials thought TSPR's findings focused too much on one specific campus and the situation at that campus portrayed as the situation at each kitchen in the entire district. Administrators said the recommendation could have led to negative reports from the media and might have upset parents when, as a whole, BISD's health inspections have resulted in high scores. One person cautioned TSPR to be sure that when evaluating operations not to let one site serve as the representative of the entire district. However, the Child Nutrition manager added that he thought it was particularly helpful to have another set of eyes looking at food service operations with an approach that took into account financial aspects, as opposed to the state health inspectors who are concerned only with sanitation issues.

One BISD board member did not think TSPR's savings were practical or attainable and that TSPR had been too aggressive in its savings projections. TSPR staff has heard this comment in other districts and is now putting all savings estimates through a more rigorous process to ensure that all estimates are conservative.

## Appendix A: Status of Recommendations and Savings

### Chapter 1: District Organization and Management

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	BISD's Projected Five-Year Savings (Costs)	Comments
1	Establish "self-censorship" guidelines and obtain additional guidance concerning governance issues from a variety of sources. p. 22	In Progress	(\$3,200)	\$0	(\$3,200)	The district conducted two retreats for the board in December 2000 and January 2001 to set the superintendent's performance goals. However, additional training and self-evaluation are still needed and are in progress.
2	Use the District Improvement Plan (DIP) as the designated BISD strategic plan and integrate all other plans into the DIP. p. 33	In Progress	\$0	\$0	\$0	The objectives in the District Improvement Plan (DIP) will be presented to the board for approval in spring 2002. The DIP focuses on the students' academic improvement. The plan incorporates four broad-based board goals to close

						achievement gaps in all student groups, create an inclusive and service-oriented environment, develop an effective counseling and career planning program and develop systematic management structures for district operations. All other plans developed for the district are to follow the same format and alignment.
3	Revise the District Improvement Plan to include all functions of school district operations. p. 37	In Progress	\$0	\$0	\$0	All functions of the district are to be included in the 2001-02 DIP.
4	Tie the allocation of resources to the District and Campus Improvement Plans. p. 39	In Progress	\$0	\$0	\$0	The timeline for planning and approval of the campus and district improvement plans are being changed to allow the district to align resources during the fiscal budget planning cycle.
5	Reorganize BISD operational	Complete	\$271,400	\$65,791	\$263,164	The reorganization

	functions to fully use all senior management positions. p. 42					has been implemented with a director of Operations instead of a Human Resources Coordinator. The reorganization resulted in the elimination of a deputy superintendent. BISD is also engaging in management training to improve the way district administration work together.
6	Create a position of assistant Community Resource coordinator. p. 51	Complete	(\$155,250)	(\$28,750)	(\$156,150)	BISD hired a communication specialist in September 2000. This newly created position has had a positive effect on the Communications Department and made it more efficient. The position also oversees the Partners in Education volunteer programs, Hand-in-Hand Mentor program, Adopt-a-School, updates and

						maintains Web sites, assists with the community education program and manages districtwide facility use.
	<b>Totals: Chapter 1</b>		<b>\$112,950</b>	<b>\$37,041</b>	<b>\$103,814</b>	

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

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	BISD's Projected Five-Year Savings (Costs)	Comments
7	Increase the emphasis on testing all students and reducing TAAS exemptions for minority students. p. 73	In Progress	\$0	\$0	\$0	BISD is now above average in total participation of students tested, with a 96.7 percent participation rate for 2000-01. BISD made significant progress in increasing the number of African Americans taking the TAAS for 2000-01. The African American exemption rate for 1998-99 was 18.5 percent, 1999-2000 was 17.9 percent and in 2000-01, BISD cut that exemption rate to 3.1 percent.
8	Increase the student-teacher	In Progress	\$1,642,200	\$358,597	\$1,434,388	BISD shifted some

	ratio at all secondary campuses by an average of one student per teacher. p. 76					secondary education personnel to the elementary level, and through attrition, some positions have been eliminated. This change has allowed the district to give its teachers another \$1,850 a year pay raise, which places BISD as the highest paying district in the Austin area. BISD also said that its latest submission to PEIMS will have a student-to-teacher ratio of 13.9:1, an improvement over the 13.2:1 ratio of 1999.
9	Develop a formal program evaluation process, clearly define roles and responsibilities and provide trained staff to lead the program. p. 89	Complete	\$0	\$0	\$0	The instructional program evaluation process owner is the assistant superintendent for Curriculum and Instruction. All curriculum staff are trained in the evaluation

						process. The process provides a framework for systematically evaluating instructional and support programs.
10	Evaluate the programs funded through compensatory education and direct funds to successful programs and areas of greatest need. p. 96	In Progress	\$0	\$0	\$0	An evaluation of the compensatory education funded programs is to begin in spring 2002. The people responsible are the assistant superintendent for Finance and the assistant superintendent for Curriculum and Instruction.
11	Amend the gifted and talented identification procedures. p. 109	Complete	(\$1,505)	(\$6,000)	(\$6,000)	Amending the identification procedures for gifted and talented students has been completed. They are to be implemented in 2001-02.
12	Standardize discipline policies and the consequences for violations for all schools in the district. p. 123	In Progress	\$0	\$0	\$0	Standardization is being implemented through two foundations, the Establishing Positive

						Discipline Policies Foundation and the Conversation, Help, Activity, Movement and Participation (CHAMPS). Discipline standardization is set to be complete in 2002-03.
	<b>Totals: Chapter 2</b>		<b>\$1,640,695</b>	<b>\$352,597</b>	<b>\$1,428,388</b>	

## Appendix A: Status of Recommendations and Savings

### Chapter 3: Personnel Management

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	BISD's Projected Five-Year Savings (Costs)	Comments
13	Evaluate the benefits of remaining in the Personnel Services Cooperative. p. 138	Complete	\$27,600	\$0	\$0	<p>BISD has participated in the Region 13 Personnel Service Cooperative (PSC) since the 1998 hiring season. The Human Resources Department has evaluated the benefits of remaining in the PSC. The PSC is the first step in the BISD personnel application process. Approximately 1,400 individuals applied to BISD for the 2001-02 school year. BISD attended approximately 10 job fairs during 2000-01. BISD averaged about one hire per job fair. The</p>

						total staff hired for 2001-02 was 84. Finding teachers in shortage areas of subject matter is a difficult task. Membership in the PSC gives BISD access to all who have applied with the system.
14	Eliminate central office interviews for teacher applicants. p. 139	Complete	\$0	\$0	\$0	With changes in the PSC, principals requisition applicants themselves and have access to all of the applications online. Human Resources meets with the principal's recommended applicant and makes the job offer. Principals identified the issue as a high need and the change has made a difference in the teacher hiring process.
15	Implement a controlled retirement incentive plan. p. 142	Not Implemented	\$1,375,294	\$0	\$0	BISD consulted with Educators Preferred Corporation (EPC) in spring 2001. A

						retirement plan was proposed but the board did not approve it, because the board is concerned about "chasing off" the best teachers. In previous years, BISD has had about five retirees. In the 2000-01 school year, 14 teachers and four administrators retired. The board plans to reconsider the recommendation in 2001-02 if it does not have a large number of teachers retire.
16	Reorganize the Human Resources Department as part of the district-wide restructuring effort. p. 145	Complete	\$0	\$0	\$0	In November of 2000, the Human Resources Department was reorganized.
17	Hire a seasonal employee to handle routine clerical functions, file documents and answer the telephone in the Human Resources Department during the summer. p. 146	Complete	(\$41,280)	\$0	\$0	While the district has chosen to approach this issue from another standpoint, the spirit of the recommendation has been accomplished without

						additional cost to the district. By changing the hiring process and reorganizing the function, the district has been able to make these functions work without having to add a new position.
18	Document all key personnel policies and procedures. p. 152	In Progress	(\$2,400)	\$0	\$0	The assistant superintendent of Human Resources and the director of Human Resources have attended the Texas Association of School Boards (TASB) Wage and Salary Workshop to identify guidelines for setting employee salaries. They have also worked closely with the consultants at TASB to evaluate existing salaries and wages. Position controls have been designed for the professional and

						paraprofessional staff to monitor staffing changes. BISD is in the process of designing the same controls for the auxiliary staff. An Employee Handbook has been given to all of the employees in BISD. Employee handbooks did not exist before 2001-02.
19	Eliminate unnecessary information stored in employee files and implement a document imaging program. p. 153	In Progress	(\$45,000)	\$0	(\$50,000)	The Human Resources Department has revised its professional application, resulting in a decrease in stored documents. The district is only maintaining required documents in personnel files. BISD is continuing to evaluate the benefits of using document imaging.
<b>Totals: Chapter 3</b>			<b>\$1,314,214</b>	<b>\$0</b>	<b>(\$50,000)</b>	

## Appendix A: Status of Recommendations and Savings

### Chapter 4: Facilities Use and Management

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	BISD's Projected Five-Year Savings (Costs)	Comments
20	Develop a long-range facilities master plan. p. 166	Complete	\$0	\$0	\$0	In November 2000, the district organized a Long-Range Facilities Committee. Meetings were held through July 2001. Two public hearings were held, and a final presentation was made to the board on July 17, 2001. BISD is using the results of the long-range facilities master plan to call for a \$119 million bond election in February 2002.
21	Convert either Mina Elementary School or the West Campus of Bastrop High School to offices for district administration and for the special education cooperative. p.	In Progress	\$244,276	\$0	\$0	In fall 2000, BISD decided to convert Mina Elementary School into a central administration facility. The district hired a construction manager in

	173					November 2001 and construction is scheduled for completion by September 2002.
22	Determine whether a private contractor could provide better grounds maintenance at a lower cost than BISD. p. 177	In Progress	\$0	\$0	\$0	The district's maintenance director is researching this issue and will make a report to the BISD administrative council by January 2002. Currently, no local companies seem interested; if an Austin-based company will do it for less than what the cost is to the district, BISD will move forward.
23	Develop and distribute written work order priorities and provide a list of typical maintenance work for each priority level. p. 181	Complete	\$0	\$0	\$0	The Maintenance Department has established a process improvement team that is experimenting with potential changes to the work order system, including work order priorities. The proposed plan calls for three levels of priority: urgent, routine and deferred.
24	Have SECO	Complete	\$0	\$0	\$0	A SECO study

	<p>conduct an energy management audit of all BISD facilities that do not have energy efficient temperature controls. p. 187</p>					<p>and an independent auditor have submitted recommendations and cost estimates. The study shows that the needed \$1.2 million investment will net \$125,000 annually in savings, which can be used to pay for the initial investment. The Maintenance Director is analyzing the recommendations with his team and will make recommendations to the BISD administrative council for submission to the board.</p>
	<p><b>Totals: Chapter 4</b></p>		<p><b>\$244,276</b></p>	<p><b>\$0</b></p>	<p><b>\$0</b></p>	

## Appendix A: Status of Recommendations and Savings

### Chapter 5: Financial Management

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	BISD's Projected Five-Year Savings (Costs)	Comments
25	Settle the successor-in-interest for the BCED between participating districts. p. 199	In Progress	\$0	\$0	(\$2,000)	Meetings will be scheduled during 2001-02 to discuss this issue with all entities involved. BISD has called other districts and talked to an auditor about resolving the problem.
26	Contract with an external audit firm to perform annual internal audits. p. 199	Complete	(\$33,750)	(\$3,000)	(\$15,000)	A contract for an audit of activity funds has been signed. The audit will begin in the spring of 2002, which is down time for audit companies, so the cost is reduced. The district has decided to contract for an annual audit of the activity funds. The

						process will become annual in spring 2002.
27	Develop an implementation strategy for GASB Statement No. 34 to meet annual external financial reporting guidelines and TEA regulatory reporting requirements. p. 204	Complete	\$0	\$0	\$0	Staff has received training and has met with independent auditors concerning implementation of GASB 34. BISD staff members were not only trained, but one employee became a trainer.
28	Contract for organizational consulting services to make the payroll process more efficient. p. 206	Complete	\$81,144	\$27,104	\$135,520	Changes have been made to the payroll processes through software changes and a reorganization of district staff.
<b>Totals: Chapter 5</b>			<b>\$47,394</b>	<b>\$24,104</b>	<b>\$118,520</b>	

## Appendix A: Status of Recommendations and Savings

### Chapter 6: Asset and Risk Management

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	BISD's Projected Five-Year Savings (Costs)	Comments
29	Modify the depository agreement and cash and investment policies to provide sweep of idle cash balances into higher-yielding investments on an overnight basis. p. 215	In Progress	\$13,475	\$1,500	\$7,500	A depository contract was bid in June 2001, and only one bid was received. As of January 2002, this bank does not have the ability to offer sweep accounts but is in the process of updating services and may have this service available by the start of the 2002-03 school year. The contract could be changed at that time. The bank has raised the interest rate offered to the district due to not currently

						having the ability to provide the district with sweep accounts, allowing BISD to generate additional revenue.
30	Make arrangements with the depository bank to convert existing accounts payable and payroll clearing accounts to controlled disbursement accounts to take advantage of clearing time for checks. p. 217	Not Implemented	\$0	\$0	\$0	The area banks do not currently have the capability to offer controlled disbursement accounts. The banks, however, are researching what it would take to offer this service.
31	Revise the investment policies and procedures to allow the purchase of U.S. Agency securities and commercial paper. p. 218	Rejected	\$116,212	\$0	\$0	The district's policy allows investment in commercial paper and pools. The funds were moved from Lone Star Liquidity Plus to Lone Star Corporate for the majority of the 2000-01 school year. After the events of September

						2001, the finance committee met and decided to move the money in the shortest term pools with no commercial paper, due to risk factors being so high. The finance committee also believed it was best to not invest directly in commercial paper.
32	Streamline the fixed assets record keeping process. p. 222	Complete	\$0	\$0	\$0	Only items worth more than \$5,000 are kept in the fixed asset file as part of the fixed asset record keeping process. Inventory items are kept in a separate database file for insurance purposes.
33	Require capitalization and inventory of items with a unit cost of \$5,000 or more. p. 222	Complete	\$0	\$0	\$0	The board adopted a formal policy in September 2001. Capitalization

						and inventory of items worth more than \$5,000 are also part of the GASB 34 requirements.
	<b>Totals: Chapter 6</b>		<b>\$127,972</b>	<b>\$1,500</b>	<b>\$7,500</b>	

## Appendix A: Status of Recommendations and Savings

### Chapter 7: Purchasing and Warehousing Services

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	BISD's Projected Five-Year Savings (Costs)	Comments
34	Establish a procedure to ensure compliance with all state and local purchasing laws and policies. p. 232	Complete	\$0	\$0	\$0	BISD has updated the purchasing manual for 2001-02 to reflect purchasing laws.
35	Hire a purchasing agent. p. 233	Complete	(\$281,250)	\$0	\$0	The district hired a purchasing coordinator. This action was part of the overall district reorganization. The total savings and net cost are reflected in Recommendation 5.
36	Automate the purchase requisition and order process. p. 233	In Progress	\$0	\$0	\$0	A process improvement team is looking at all software for the district. BISD has added automated purchase orders with vendors and is in the process

						of expanding the district's automatic purchase orders with these vendors to the campus level. The district is training campus secretaries on how to use vendor software.
37	Submit all bid extensions to the board for approval. p. 234	Complete	\$0	\$0	\$0	The district has developed forms for board feedback prior to bid extension approval by the board.
38	Revise BISD purchasing procedures to include a definition of "sole-source" purchases that matches the definition found in TEA's Financial Accountability System Resource Guide. p. 235	Complete	\$0	\$0	\$0	The district added a definition of sole-source purchases to the district's Purchasing Procedures Manual.
39	Update BISD administrative procedures to require the use of Requests for Proposals (RFP's) for all future revenue contracts. p. 237	Complete	\$0	\$0	\$0	BISD bid the vending machine contract and is in the process of bidding student pictures using a Request for Proposals.
40	Establish an interlocal agreement with	Not Implemented	\$0	\$0	\$0	The district will discuss this issue with other

	other school districts in Bastrop County in order to make purchases using each other's bids. p. 238					districts in the spring of 2002.
	<b>Totals: Chapter  7</b>		<b>(\$281,250)</b>	<b>\$0</b>	<b>\$0</b>	

## Appendix A: Status of Recommendations and Savings

### Chapter 8: Child Nutrition Services

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	BISD's Projected Five-Year Savings (Costs)	Comments
41	Implement employee incentive and pay-for-performance programs that are based on exceptional performance and good attendance. p. 251	In Progress	(\$4,500)	\$0	(\$3,600)	The new Child Nutrition Services director and staff are studying possible programs and will make recommendations to the Human Resources Department by May 2002. The district may work on this in all operational areas depending on the success of this recommendation in the Child Nutrition Services Department.
42	Hire two full-time floater cafeteria employees and eliminate the use of substitutes. p. 252	Complete	\$13,093	\$0	\$0	Current staffing levels are adequate, and substitute positions are sufficient to cope with absent employees. All new hires are typically placed

						on sub lists and are considered for unfilled and or future positions. The Child Nutrition Services Department is fully staffed. Since the original review, hiring additional staff has not been necessary.
43	Sell federally-approved snacks to secondary students throughout the school day. p. 253	Complete	\$0	\$0	\$0	While the district did not choose to open a snack bar, it took control of vending machines. BISD placed healthy snacks that are available throughout the school day into the vending machines.
44	Eliminate operational barriers and implement new programs to increase meal participation. p. 255	In Progress	\$90,864	\$66,890	\$306,890	The barriers observed by the review team had to do with serving line and kitchen designs at BHS and BHS West. BISD Child Nutrition Services has implemented a program in which most items served with very few exceptions are sold either as a la carte items or as items for

						<p>which the district can be reimbursed by the federal government. BISD's goal is to reduce the stigma associated with "free lunch" choices. The district has revamped the traditional service method by creating food court style menus with multiple choices. As a result, BISD has tripled reimbursable meal participation, which will add an additional \$100,000 to revenue in 2001-02. Children eligible for free meals can now access "snack bar type foods" and appear to be paying customers.</p>
45	<p>Establish a district policy to control the sale of foods in competition with meals served under the National School Lunch and Breakfast Program and outlined in TEA's</p>	Complete	\$0	\$0	\$0	<p>Procedures are in place so that all vending machine companies must work through the Child Nutrition Services Department. The Child Nutrition Services director</p>

	Child Nutrition Programs Administrator's Reference Manual. p. 258					has implemented tight restrictions on vending machine placement and closely monitors vending sales during serving periods to ensure compliance with federal requirements.
46	Establish Meals Per Labor Hour (MPLH) standards and evaluate each cafeteria's productivity based on the district's actual operation. p. 261	Complete	\$322,000	\$0	\$0	Along with other audit controls, such as annual internal auditing, profit/loss reporting, comprehensive review audits by TEA and monthly monitoring, the Child Nutrition Services director now uses a MPLH format for cost controls. The district's projected savings are all accounted for in the total net savings shown for Recommendation 44.
47	Comply with the state, local and federal laws regarding proper sanitation and health standards in BISD kitchens. p. 263	Complete	\$0	\$0	\$0	During the past 12 years, no school cafeteria in operation has ever scored less than 83 on a state inspection, and in most cases, the staff has received

						<p>scores of 95 +. In 2000-01, Bastrop County's Health and Sanitation Department audited BISS for the first time and the average score was 95 to 97 with two schools scoring perfect. BISS has also encouraged Bastrop County to use cafeterias and staff to train Health Inspectors. In addition, BISS has four employees trained in the Hazard Analysis Critical Control Point Program (HACCP), which includes the latest trends and techniques for safe food preparation and delivery. BISS Food Services has implemented updated in-service training in safety and sanitation. Safety and sanitation training is mandated annually.</p>
	<b>Totals: Chapter 8</b>		<b>\$421,457</b>	<b>\$66,890</b>	<b>\$303,290</b>	

## Appendix A: Status of Recommendations and Savings

### Chapter 9: Transportation

Rec#	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) to Date	BISD's Projected Five-Year Savings (Costs)	Comments
48	Set up a procurement card to purchase inventory as needed and reduce present inventory levels for transportation parts by 40 percent. p. 281	In Progress	\$29,425	\$0	\$0	Per rules established in cooperation with the Business Office, procurement cards are not part of the system-these cards are similar to open purchase orders. However, parts inventory has been reduced to levels at or around \$39,000 through improved monitoring and accountability techniques. This recommendation has helped senior management address serious issues and make some dramatic changes.
49	Purchase automated bus	In Progress	\$254,792	\$0	\$120,000	Software specifications

	routing software. p. 283					are being developed for bid. Funds are available in the 2001-02 budget. Software purchase and implementation is planned for the spring of 2002.
50	Develop a comprehensive safety-training program designed specifically for on-the-job injuries. p. 284	In Progress	\$0	\$0	(\$2,000)	The district has increased in-service training in association with BISD's safety officer and the district's insurance company. The Transportation Management team is meeting to determine the size and scope of necessary training and the impact on the budget. The district cites full implementation for 2002-03 at a \$2,000 cost.
51	Implement an incentive program to reduce bus accidents. p. 285	In Progress	\$60,750	\$0	\$30,000	An Accident Review Committee composed of the district safety officer, two drivers, a mechanic and someone in management outside of the Transportation

						Department is being revamped along with the Transportation Department's existing guidelines. The new Transportation director will be working with a communication committee to develop and implement an incentive program by fall 2002. BISD is looking at donations from area merchants to serve as incentives for drivers rather than bonuses. Drivers will also be able to request better routes.
52	Review the current bus-washing facility lease contract to determine if it can be terminated or modified as a lease-purchase contract. p. 287	Not Implemented	\$0	\$0	\$0	The district has made no effort to review the bus-washing facility lease contract because the main issue involves connection to a sanitary sewer system if an on-site facility is constructed.
<b>Totals: Chapter 9</b>			<b>\$344,967</b>	<b>\$0</b>	<b>\$148,000</b>	