

# **DALLAS INDEPENDENT SCHOOL DISTRICT PROGRESS REPORT**

## **Introduction**

In June 2001, Texas Comptroller Carole Keeton Strayhorn released the results of her school performance review of the Dallas Independent School District (DISD). Based upon more than seven months of work, this report identified 193 recommendations that could, if fully implemented, result in net savings of more than \$53.8 million over the next five years. In December 2001, at the request of Superintendent Dr. Mike Moses, TSPR returned to assess the district's six-month progress and, where necessary, answer questions or assist the district in developing implementation strategies. At that time, the district was making significant progress, well on their way toward full implementation. In September 2002, TSPR returned to assess the district's one-year progress in implementing the 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 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 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 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 are now 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 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 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 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](http://www.window.state.tx.us).

## **TSPR in the Dallas Independent School District**

On August 24, 2000, the DISD Board of Trustees asked Comptroller Strayhorn to conduct a performance review of the district's operations and agreed to pay one-fourth of the review's cost, or \$200,000 of \$800,000. Work began in Dallas in November 2000. In the final report issued in June 2001, the greatest challenges facing DISD included:

- an inadequate focus on the district's primary mission of educating students;
- a basic lack of accountability at all levels of district operations;
- leadership instability and board turmoil;
- poorly planned and managed contract services; and
- the failure of core business functions, including human resources, facilities, purchasing and financial management, to meet basic district needs and comply with state and federal laws, rules and regulations.

The June 2001 review marked the second time that TSPR had reviewed DISD. A 1992 TSPR review of DISD contained 296 recommendations that promised to generate \$60.5 million in savings. A 1995 progress report showed that 99 percent of the recommendations had been implemented, with reported savings of \$24.8 million to date.

The Comptroller contracted with McConnell, Jones, Lanier and Murphy, a Houston-based firm, to assist with the present review. The review team interviewed district employees, school board members, parents, business leaders and community members and held 15 public forums at various district high schools on November 13, 14 and 16, 2000. To obtain additional comments, the review team conducted 27 focus group sessions with various district and community organizations.

About 3,160 persons completed and returned written surveys, including 120 campus and central administrators and support staff, 167 principals and assistant principals, 781 teachers and 2,092 students. In addition, TSPR conducted a random telephone survey of 1,223 area households. The Comptroller's office also received letters, e-mails and phone calls from a number of parents, teachers and community members. 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).

DISD selected several "peer districts" for comparisons based on similarities in student enrollment, student performance and community and student demographics. The districts selected included Austin, El Paso, Fort Worth, Houston and San Antonio. TSPR also compared DISD to district averages in TEA's Regional Education Service Center X (Region 10), to which DISD belongs, and the state as a whole.

## **DISD in Profile**

At the release of the June 2001 report, DISD ranked as the nation's 11th largest school district; it has since been surpassed by the Hillsborough

County, Florida public school system and now stands as the 12th largest school district. As the second-largest district in Texas (exceeded only by Houston ISD), DISD served more than 163,000 students in 2001-02. DISD's enrollment has risen steadily since 1996-97, from 154,847 to 163,562 in 2001-02. The district consists of 218 schools: 156 elementary schools; 25 middle schools; 28 high schools; and nine alternative education programs.

The families who live in the "majority minority" district speak 58 different languages. In 2001-02, the district student ethnic composition was 56.8 percent Hispanic; 34.3 percent African American; 7.2 percent Anglo; 1.3 percent Asian/Pacific Islander; and 0.4 percent Native American. Economically disadvantaged students total 76.1 percent of the student population.

In 2001-02, 27 DISD schools received an Exemplary rating from TEA, a 238-percent increase from 1999-2000's eight Exemplary schools; 40 schools received a Recognized rating, a 150-percent increase from 1999-2000's 16 Recognized schools; 129 rated as Acceptable, an 18-percent decrease from the 157 schools with that rating in 1999-2000; and 15 received a Low Performing rating, a 46-percent reduction from the 1999-2000's 28 Low Performing schools. The district received an overall Academically Acceptable rating. George Bannerman Dealey Montessori School (seventh and eighth grades) was named a 2001-02 National Blue Ribbon School.

In 2001-02, 82.4 percent of all students passed the reading portion of the Texas Assessment of Academic Skills (TAAS) test; 84.9 percent passed the math portion; 77.3 percent passed the writing portion; and 71 percent of students passed all tests.

In 2001-02, the district employed a staff of 19,241 employees, with teachers accounting for 10,443, or more than 54 percent, of DISD staffing. The district had expenditures of \$1.23 billion. This same year, DISD generated its budget revenues from the following sources: 68 percent through local taxes; 17 percent from federal sources; 12 percent from the state; and 3 percent from other local and intermediate sources. In 2001-02, DISD budgeted 53.6 cents of every tax dollar on classroom instruction compared to the state average of 51 cents.

Over the last year, significant changes have occurred in the district.

- In January 2002, voters approved the district's largest-ever bond program, \$1.37 billion, to build 20 new schools and renovate or add to the 218 existing schools. Construction, scheduled to begin in early 2003, will take five to eight years.

- Census changes required new elections in spring 2002 for each of the nine positions of the single-member board district. All but two board members, who had resigned, were re-elected.
- The district developed a plan to attract and retain a qualified teaching workforce that included: increasing the beginning teacher salary from \$34,000 to \$37,000; offering a \$1,500 sign-on bonus for new hires; adding a \$500 English as a Second Language (ESL) stipend; and providing \$250 to every teacher for supplies. As a result of an intensive regional recruitment effort, DISD started 2002-03 with only 28 teacher vacancies.
- The district created a curriculum scope and sequence, which is aligned with the state's educational accountability system and is accessible on-line for improved service delivery to campuses and teachers.

While work continues in the district, DISD has made stellar progress in a short amount of time. The district implemented 178 recommendations and have 14 in progress. The district rejected only one recommendation.

While some districts reviewed by TSPR have focused on implementing only the most basic elements of the recommendations, it is important to note that DISD felt that it was important to look past the letter of the recommendations when necessary and implement the spirit of the recommendation; changes that ultimately took the improvements and savings to even higher levels than originally envisioned. TSPR applauds DISD's efforts and believes this "can do" attitude has allowed the district to quickly and efficiently improve and streamline overall operations. (See Appendix A for details on the recommendations' status.)

## Dallas ISD Report Card

### Exemplary Programs and Practices

DISD is a school district with some notable successes, and TSPR has identified numerous "best practices." Through commendations in each chapter, the original report highlighted model programs, operations and services provided by DISD 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 are listed below followed by updated information on each topic in italics.

- *Medicaid reimbursement* - DISD aggressively pursues Medicaid reimbursements for the services it provides to students with disabilities. In 2000-01, DISD switched its contract for the

administration of this program from a private sector company to Houston ISD, which was able to provide the service at a lower cost, thus increasing the net revenue generated for DISD. Through continual evaluation and improvement of processes for obtaining Medicaid reimbursement for eligible costs under the SHARS (school health and related services) and MAC (Medicaid administrative claiming) programs, the district has obtained \$9.8 million since 1997.

*DISD continues to aggressively pursue Medicaid reimbursements through its contract with Houston ISD. In 2002-03, DISD centralized its Medicaid coordination into one department, enabling it to refine service provider procedures in the SHARS program and to develop staff-specific training in the MAC program. Since 1997, the district has netted more than \$12.5 million from these programs' reimbursements.*

- **Meeting local workforce needs** - By working closely with campus-based and districtwide advisory committees, the Career and Technology Education (CATE) program has ensured that its offerings are relevant to the needs of area employers. In addition, graduates receive computer-based information about occupations, seminars and job referrals through the district's Graduate Placement Center. In addition, special education students at the Multiple Career Magnet Center are trained in workplace skills to help them find and keep jobs and live independently.

*Through its advisory committees, DISD continues to work with Dallas-area employers to review programs and provide up-to-date curriculum for students. In April 2002, the Graduate Placement Center conducted a job fair for high school graduates. The Multiple Career Magnet Center continues to implement and improve its transition-focused education emphasizing employment and living in the community. In addition, the district introduced principals and teachers to a new Teacher Prep Dallas! Program that encourages students to consider Career and Technology Education courses exploring teaching careers.*

- **Student health services** - Since 1974, the district has forged partnerships with state, local and private health service organizations to provide medical and mental health services to its students. Its nine Youth and Family Centers (YFCs) serve a group of 20 to 25 campuses. In 1999-2000, YFCs treated 11,911 clients, 62.5 percent of whom were economically disadvantaged; 99 percent had no private medical insurance.

*Following the review, DISD constructed a new Youth and Family Center facility in the southeast sector of the city at Seagoville Middle School. Plans are underway for another center at Lincoln Humanities and Communications Magnet School.*

*According to the Youth and Family Center's 2001-02 program evaluation, clients made statistically significant performance gains over the previous year on education accountability tests. During 2001-02, the Youth and Family Centers provided 11,698 students with 59,803 physical and mental health care services. Almost 80 percent of the students served were economically disadvantaged and 99.9 percent of the clients reported that they did not have health insurance. More than 97 percent of students and family members receiving services reported in recent satisfaction questionnaires that they were happy with the services and said they would return if services were required. School personnel reported significant improvement in student attendance and student behavior for Youth and Family Center clients. All principals surveyed reported that the Youth and Family Centers provide quality services to students and their families.*

- ***Electronic validation of teaching and professional staff certifications*** - With almost 15,000 teachers and other professional staff requiring certification, verification of certification data maintained by the State Board of Educator Certification (SBEC) is a major task. By electronically matching DISD's list of teachers and professional staff with SBEC's master list of current certifications, the district has made the process more efficient. Since August 2000, the district identified seven employees with sanctioned or revoked certifications.

*DISD continues to communicate with SBEC to match the local district certification codes to their current certification codes. Additionally, Texas has implemented new certification standards and DISD is aligning its data fields to those maintained by SBEC. The district expects to finalize this process soon and repeat the electronic match of certification records in fall 2002.*

- ***Integrating technology in the classroom*** - Institutions of higher education, community groups and businesses have partnered with DISD providing the district with 1,150 networked computers for 23 schools, 10 printers and specialized training for 20 master teachers. These 20 master teachers will train 20 additional teachers each year in techniques for integrating technology into the curriculum. In addition, DISD is participating in an intradistrict distance learning pilot program that will allow students from

throughout the district to receive instruction from a master teacher located in one of the district's six participating high schools.

*Since the review, DISD has pursued additional partnerships, including state and federal educational agencies, and has expanded the specialized training to include hundreds of teachers. In addition, the distance learning pilot program expanded into a full program now operating in the district's 10 participating high schools.*

*DISD's multi-year programs include Intel Teach to the Future, the Technology Outreach Program and the Technology Immersion Project. New partnerships that focus on technology integration include Voyager University, a consortium that includes the Technology Infrastructure Fund Board (TIF), the University of North Texas, Voyager Inc., the district and three additional TIF awards - Special Projects, PS 10, and PS 11. The distance learning program is continuing into its fourth year with the videoconferencing labs in 10 high schools that are now connected to three Regional Education Service Center X (Region 10) videoconferencing labs in the district.*

- ***Three-step annual evaluations of principals*** - In August, area superintendents conduct a "pre-conference" with principals to develop mutually agreed-upon, measurable goals. In January, a mid-year evaluation is held to review peer observations. In June, a final, summary evaluation measures progress toward the established goals.

*In 2002-03, the three-step process expanded to include all campuses, not just low-performing campuses. By fall 2002, the area superintendents will complete the first step, which involves individual campus analysis of AEIS data regarding campus academic performance, attendance, and dropout rate. If a principal's score falls below 70 percent on the overall improvement rating on the evaluation, the area superintendent and the principal will develop an intervention plan. Each principal will conduct mid-year and end-of-year conferences to provide ongoing assistance and review and to complete the process.*

- ***Arts-in-education initiative*** - ArtsPartners is a citywide arts-in-education initiative launched by the City of Dallas Cultural Affairs Commission in partnership with DISD. Through the program, which operates during the school day, students attend arts and cultural events; have music, dancing and art lessons; or attend the opera, theater or zoo. This program is integrated into the curricula



and gives access to cultural events to children from all backgrounds.

*During 2002-03, approximately 101,000 students and 4,500 teachers - all elementary students and teachers in DISD - will benefit from ArtsPartners programs. Teachers will receive ongoing professional development through a new curriculum, which can be applied across curriculum areas. In addition, ArtsPartners launched a Web site providing teachers access to a searchable program database and professional development tools, as well as curriculum models and best practices in arts education.*

*ArtsPartners is also in the second year of a three-year longitudinal study in partnership with the Annenberg Center that is measuring the effects of an integrated arts and culture curriculum, specifically on literacy and academic achievement.*

- **Cash Management** - The district maintains only five checking accounts for normal business operations. This results in lower bank service fees and requires less employee time reconciling accounts and overall administration of the accounts.

*The district has implemented the use of Internet-based banking technology in its treasury and financial areas, including online investing and reporting and bank account information reporting. Transactions are protected with encryption technology to prevent an unauthorized user from obtaining or disseminating district financial data.*

*DISD's use of multiple Internet technology programs made available by the district's depository bank enhances its transaction-handling capabilities geographically. Transactions may be initiated and approved, via Internet, from anywhere in the world. In addition, information reporting is available to multiple users regardless of geographic location. The ease by which multiple user access can be granted to pre-approved DISD personnel reduces administrative tasks, paper-handling and copying costs.*

- **Contracts for vehicle parts supply services** - DISD contracts with a nationally recognized parts company to provide a guaranteed price for 85 percent of all auto parts on demand and 95 percent of all auto parts that are delivered by the next business day after ordering. The contract also requires full manufacturer's warranties on all parts and a fixed 10 percent net profit for the contractor.

*Since the review, the district's Fleet Maintenance Division has reduced vehicle and equipment downtime. With repair parts readily available, repair backlogs have been reduced allowing more time for preventative maintenance work on vehicles and equipment. Reduced equipment downtime provides increased productivity while providing reliable equipment for personnel. The actual percent of parts received on demand exceeded the 85 percent guaranteed.*

Since the review, DISD has identified additional model programs, operations and services that have been submitted and accepted for inclusion on the Comptroller's AIMS database. A sample of those additional programs follows.

- ***Customer Service Center*** - In March 2002, the district opened its Customer Service Center with four main goals: to improve the district's credibility with the community; to ensure accurate and consistent dissemination of information; to ensure uniform resolution standards across the district; and to provide management reports to target problem areas and prioritize resources. The Center's customer service operators route calls from parents, employees or the general public to the appropriate persons and/or departments within the district in a timely, efficient and courteous manner. Customer service representatives handle callers with concerns and/or complaints about district matters, its departments or personnel. The staff enters all concerns or complaints into an automated call-tracking system that generates performance reports. In addition, the Center provides assistance to all district departments interested in improving operational processes by evaluating their processes and then formulating recommendations for improvement that includes the tools necessary for implementation of those improvements.
- ***AlignDesign*** - By developing a deep understanding of the relationship between the Texas Essential Knowledge and Skills (TEKS) state objectives and the new state assessment - Texas Assessment of Knowledge and Skills (TAKS) - in Language Arts, Mathematics, Science and Social Studies, grades K-12, DISD is working to align its curriculum, instruction, assessment and professional development. AlignDesign includes an innovative process that promotes student success on the TAKS by effectively implementing the TEKS and the district's curriculum design with a focus on higher standards in classroom instruction and assessment through the development and implementation of a district/vertical team curriculum and assessment staff development plan.

- ***Oasis (Objective Alignment System in Schools)*** - Oasis, a web-based curriculum service, accelerates and improves the efficiency and effectiveness of lesson planning, delivery of instruction, assessment of student performance and connectivity with instruction resources. It is designed to provide immediate access to the TEKS, TAKS objectives, lesson-planning format, local and state curriculum resources, classroom strategies and activities. In addition, through the "Taught Report," teachers can document curriculum objectives completed and enter lesson plans on-line. Oasis allows DISD to standardize instructional products and services districtwide, accelerating teacher and administrative access to curriculum and lesson plans.
- ***DISD Teacher Recruitment CD-ROM*** - The Human Resource Services Department provides prospective teachers a CD ROM, eliminating the need for paper folders of DISD information and hard copy application forms. The CD ROM provides a direct link to the district's Web site where prospects complete on-line applications. It also provides promotional videos from teachers and information. The CD ROM indicates the district's commitment to technology to prospective teachers.
- ***DISD Parent*** - The district created a new publication to forge a stronger partnership with parents. The publication's objectives seek to provide parents with important and interesting information about DISD, educational opportunities and ways to support their children and their children's education. The district prints 164,000 copies of the publication, which is available in English and Spanish. Two issues were published in 2002. The district distributed the first issue through the schools and mailed the second issue to students' homes. Parent response to the publication has been excellent.
- ***District 30-Second Promotional Video at American Airlines Center*** - A contract agreement with the American Airlines Center allows DISD to air a 30-second promotional video at every event in the arena for the next 10 years. Rather than hiring a marketing agency to develop the videos, district staff wrote and created two spots that ran throughout 2001-02. The videos seek to change public perceptions about DISD. The first spot highlighted the number of exemplary, recognized and U.S. Blue Ribbon schools within DISD. The second spot featured famous graduates of the school district including Karen Hughes, counselor to the president, and Michael Johnson, Olympic Gold Medalist and world record holder. Audiences at the arena have actually cheered following airing of the spots.

- ***School Zone Dallas Television Program*** - School Zone Dallas, a new fast-paced and energetic program hosted by enthusiastic students at various schools, seeks to inform the general public about DISD activities. The show will broadcast monthly on KERA 2, a channel accessible to everyone in North Texas. Each show will originate from a different DISD school and contain six feature stories. Features have included the Booker T. Washington High School for the Performing and Visual Arts Jazz combo on location at the Monterey Jazz Festival, a high school cheerleader with Down Syndrome and DISD's Teacher of the Year. The district promotes the show through posters, 30-second ads on KERA 2, its cable channels and a full page ad in DISD's annual football program. Currently, the district is investigating the possibility of placing ads on city buses. Student hosts, who must have a 3.0 grade point average, were chosen through a videotaped audition.
- ***DISD Intranet Site*** - The district's new Intranet site, Inet, provides a valuable resource for employees seeking information on topics such as employee benefits and policies, handbooks, district information, curriculum, phone numbers and district forms. The site quickly and easily supplies employees access to information and forms previously provided only in hard copy, if at all. Inet contains the district's style guide and template for letters and memos; the districtwide calendar to help schedule an event; information for use in preparing the campus improvement plans; curriculum; and the district logo. Even though school was not in session, the site received almost 10,000 hits between June 1, 2002, and August 26, 2002.
- ***Sick Leave Bank*** - The district created a Sick Leave Bank and Sick Leave Gift Program to benefit full-time district employees who suffer a catastrophic injury or illness. The bank provides a pool of local sick leave days contributed by employees to be used by bank members who suffer a qualifying incapacitating personal illness, accident or qualifying family member's terminal illness that extends beyond their own accumulated sick and personal leave. The Sick Leave Gift Program allows an employee to donate sick leave to a specific individual. It also allows an individual to receive local leave days donated by other employees. Participation in the Sick Leave Bank and Sick Leave Gift Program is voluntary.
- ***Building Detail Report*** - To assist DISD's insurance underwriter in determining the risk to DISD property, the district designed a new building report. In addition to a digital picture, the report contains the following information on each facility: description, year built, square footage, fire protection (including whether or not the

building contains a sprinkler system), the name of the building supervisor and the number of portables. It also includes general building characteristics, services, features and insurable value. The district allows the fire department access to the information to locate gas, electrical and water cutoff locations.

- ***Energy Efficiency*** - The district employed Energy Star's® Portfolio Manager to benchmark, label and track DISD schools' energy efficiency. According to the Environmental Protection Agency, Portfolio Manager contains the only national energy performance rating systems for schools. The system allows the energy management department to track improvements over time and compare the energy consumption of district facilities. The Energy Star rating system measures the energy performance of each school facility on a scale of 1 to 100. The score illustrates the comparison of energy consumption to other DISD facilities and to districts nationwide. The rating system provides useful baseline information to assist DISD in establishing energy performance targets and planning energy efficiency improvements. Each facility that scores 75 or higher and meets indoor air quality targets receives an Energy Star label that is a bronze plaque to affix to the facility. Energy Star symbolizes the district's commitment to energy efficiency and protecting the environment.
- ***"Real Time" Business Functions by School Cafeterias*** - Cafeterias now access internally-developed databases to streamline many functions that previously required extensive paperwork and several hours of labor. School cafeterias in 205 remote sites access central databases in "real time" through the district's Intranet to submit bread orders; determine student eligibility; inventory kitchen equipment; track equipment work orders; and maintain personnel assignment and history. The district is in the process of expanding the database to include milk and produce orders, training modules and daily financial and cash forms. Previously, forms were completed at school sites, copied and mailed or faxed to the Food Service central office. Documents were retrieved, organized and compiled for submission to vendors and/or other administrative offices and then filed for recordkeeping.
- ***Improved Dropout and Attendance Rates through a Program of Prevention, Intervention, and Recovery*** - In its seventh year of operation, DISD's Attendance Improvement and Truancy Reduction Program focuses on increasing student attendance; parents' educational awareness; DISD staff's dropout prevention awareness; and collaborations with community social agencies/policy makers. The district uses attendance enforcement

(judicial action), early notification of attendance issues for parents, prevention and intervention strategies and, when warranted, social services referrals for students and families to achieve a positive pattern of school attendance. In 2002, the National Dropout Prevention Network awarded DISD's initiative the Crystal Star Program Award of Excellence in Dropout Recovery, Intervention and Prevention.

## **TSPR Key Recommendations**

### **What Still Needs to be Done?**

DISD has made steady progress in implementing TSPR recommendations. The district has implemented 178 recommendations and has 14 in various stages of progress. The district did reject one recommendation. This section addresses the key areas requiring additional attention.

#### **Desegregation Order**

DISD has made great progress in implementing recommendation #23 to prepare a short-term plan to comply with the desegregation order. The district has completed its analysis and submitted documents to the courts for review. And, most recently, the district has requested a hearing, which could be held as early as March 2003. Because DISD's ethnic composition has changed over the last 31 years, with more than half of its students population being Hispanic and one-third being African American, some of the concerns surrounding the original order appear to no longer exist. One of TSPR's major concerns in making this recommendation was the fact that in some cases the order was preventing the district from moving needed resources to the under-performing campuses in the district, clearly not the intent of the original order. TSPR applauds DISD for its efforts to be in compliance with the original order. Once the court has ruled, TSPR encourages the district to move forward in distributing its resources, including personnel, in equitably addressing the needs of all children in the district.

#### **Legal Services**

Although DISD's monitoring of its legal services has improved, additional work remains. The district should continue to find ways to better manage those services (Recommendations 20 and 21). The district should issue a request for proposals for external legal services to hire a minimum of three and a maximum of five law firms with specific school-law experience to reduce legal fees and case-management activities. DISD continues to contract with external law firms, but hopes to reduce the number of

contracted law firms by February 2003. TSPR encourages the district to continue to decrease the amount of legal work that is assigned to the outside counsel. TSPR believes the district must adopt a policy to allow the general counsel to manage all legal case assignments regardless of whether they originated at the district or board level. Even though it may be easier for external counsel to meet directly with board members, overall district legal services cannot be effectively managed under this scenario.

## **Personnel Management**

DISD is currently revising job titles/job descriptions and preparing new compensation schedules (Recommendations 13, 66, 67 and 184). The district has also studied its compensation system and is designing a performance appraisal instrument. DISD needs to complete its studies and implement the plan. Timeliness in implementing such issues is critical to ensure that all DISD staff are held accountable now for their job performance based on mutually agreed-upon performance measures. Monetary incentives should be given to reward good performance.

## **Activity Funds**

TSPR commends the district for taking actions to improve the oversight of activity funds, including requiring two signatures on activity fund checks, establishing a staggered audit schedule and ensuring that all schools use the activity fund software. However, TSPR's recommendation #116 to centralize middle and high school activity funds has not been acted upon. TSPR encourages the district to centralize the management of the activity funds in the area offices. Activity monies are collected by and expended for the benefit of individual schools and their students, including campus activity funds and student activity or club funds. TSPR urges DISD to budget resources for oversight of the activity fund transactions to improve internal controls and transaction reporting. In fiscal 2000, there was an activity fund balance of more than \$5 million. This money continues to be managed individually at each school with limited controls. Consolidated management would result in overall improved controls of these resources.

## **DISD'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 Dallas ISD board members, staff members and administrators to discuss 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. It is important for TSPR to continually be mindful of those things that did not work as intended so that the review process can be improved.

Superintendent Dr. Mike Moses and DISD administrators were very complimentary of the TSPR review. They said the review offered a blueprint to assist the district in making tough decisions, such as reorganizing the administration and tightening control of contracts. The district did offer the following suggestions for improving TSPR's process.

District administrators said that TSPR should focus more on instruction rather than on a district's business functions, since learning and instruction are part of the district's core mission. DISD also said that there were some key cross-functional processes and policing issues that could have been covered more thoroughly. TSPR is continually improving each of the 12 audit protocols to ensure they accurately capture the characteristics of the functional area and identify cross-functional components. TSPR has invited DISD staff to help expand and improve on each of the areas reviewed. The educational service delivery chapter will be reviewed to expand the types of activities, programs and services reviewed. The safety and security chapter will be reviewed to ensure the audit protocols address the issues related to small and large districts having their own police department like DISD.

Some DISD staff said that review team members did not spend adequate time reviewing each department to gain a thorough understanding of district operations. DISD staff suggested that TSPR increase the length of time for consultants to visit with each department and to interview district staff. While the consultants were thorough in their questions and assessments, the district perceived that staff did not have enough opportunity to share specifics as to the varied activities that are related to programs and practices. For example, the Communications Department said that the review team overlooked many of their processes and operations and would have appreciated more time in the review process. TSPR appreciates and understands the district's concern and, in the future, TSPR will confirm that each department reviewed has provided any and all information to the review team for consideration.

DISD staff said that TSPR's implementation strategies were too prescriptive in some cases, while others felt the implementation strategies were not detailed enough. Implementation strategies are intended to



provide direction to the district about who should do what by when. They are intended to guide implementation, but clearly there is more than one way to achieve the same results. In the future, TSPR will give more attention to implementation strategies to ensure that they are clear and concise without being prescriptive.

Some district staff felt that it was difficult to determine how costs and savings were derived in some cases. For example, DISD cited the calculation of custodial allocations as a difficult fiscal methodology to replicate. The district also said that it would have been helpful if the fiscal impacts were reviewed with the district to determine if the dollars were realistic. Fiscal impacts are an integral part of the TSPR process. TSPR will continue to carefully document and verify facts with the district prior to the release of the report.

Finally, DISD said that it would have been helpful if the district staff had more clearly understood what information could have been provided to familiarize the consultants and TSPR team with the district before onsite work began. TSPR sends districts a detailed preliminary data request which is shared with consultants a few days before work begins. TSPR also encourages districts to submit additional information, but tries to limit the burden placed on the district's staff to reports not specifically requested. In the future, TSPR will more strongly emphasize the importance of the data to the districts and will provide the data to the consulting team far enough in advance of the beginning of onsite work to allow them every opportunity to fully digest that information.

January 16, 2003

The Honorable Rick Perry, Governor  
The Honorable William R. "Bill" Ratliff, Lieutenant Governor  
The Honorable David Dewhurst, Lieutenant Governor-Elect  
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 Dallas Independent School District (DISD) in implementing my Texas School Performance Review (TSPR) recommendations.

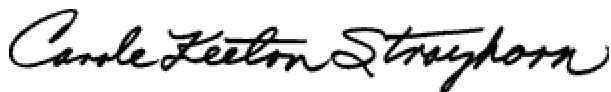
In June 2001, I released the results of my review of the district's operations. This review offered 193 recommendations that could save DISD taxpayers more than \$69.9 million by 2005-06. Cumulative net savings from all recommendations (savings less recommended investments) were projected to reach more than \$53.8 million by 2005-06. The review also noted a number of DISD's exemplary programs and model services provided by district administrators, teachers, and staff.

In December 2001, we returned for a six-month progress report, and now, 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, DISD has implemented, or is in the process of implementing, 192 of the proposals, or more than 99 percent. The district has realized net savings of nearly \$11 million and expects those savings to reach nearly \$60 million over five years.

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

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 Ken E. Marchant, State Representative, District 115  
The Honorable Elvira Reyna, State Representative, District 101

The Honorable J. Tony Goolsby, State Representative, District 102  
The Honorable Steven D. Wolens, State Representative, District 103  
The Honorable Ray Allen, State Representative, District 106  
The Honorable Helen Giddings, State Representative, District 109  
The Honorable Jesse W. Jones, Ph.D., State Representative, District 110  
The Honorable Yvonne M. Davis, State Representative, District 111  
The Honorable Fred Hill, State Representative, District 112  
The Honorable Joe L. Driver, State Representative, District 113  
The Honorable Will F. Hartnett, State Representative, District 114  
The Honorable Terri Hodge, State Representative, District 100  
The Honorable Roberto R. Alonzo, State Representative, District 104  
The Honorable Linda Harper-Brown, State Representative, District 105  
The Honorable William R. Keffer, State Representative, District 107  
The Honorable Dan Branch, State Representative, District 108  
The Honorable Bob Deuell, State Senator, District 2  
The Honorable Florence Shapiro, State Senator, District 8  
The Honorable Christopher J. Harris, State Senator, District 9  
The Honorable Royce B. West, State Senator, District 23  
The Honorable John J. Carona, State Senator, District 16

# Dallas ISD Report Card

Chapter	Total	Complete	In Progress	Not Implemented	Rejected	Percent Complete/ In Progress	Grades
District Organization and Management	23	19	4	0	0	83%/17%	Excellent
Educational Service Delivery	30	29	1	0	0	97%/3%	Excellent
Community Involvement	8	8	0	0	0	100%/0%	Excellent
Personnel Management	17	14	3	0	0	82%/18%	Excellent
Facilities Use and Management	16	14	2	0	0	88%/13%	Excellent
Asset and Risk Management	10	10	0	0	0	100%/0%	Excellent
Financial Management	23	20	2	0	1	87%/9%	Excellent
Purchasing and Contract Management	14	14	0	0	0	100%/0%	Excellent
Computers and Technology	14	14	0	0	0	100%/0%	Excellent
Student Transportation	12	12	0	0	0	100%/0%	Excellent
Food Services	13	13	0	0	0	100%/0%	Excellent
Safety and Security	13	11	2	0	0	85%/15%	Excellent
<b>Overall Grade</b>	<b>193</b>	<b>178</b>	<b>14</b>	<b>0</b>	<b>1</b>	<b>92%/7%</b>	<b>Excellent</b>

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

# TSPR Key Recommendations

District administrators and staff said the following key recommendations 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. District administrators provided comments during the TSPR team's follow-up visit to the district.

## **District Organization and Management**

### **Recommendation 9 - Conduct a strategic planning retreat to re-energize the strategic planning process and review the status of *Vision 2003*.**

The district conducted a district improvement planning retreat in February 2002 to develop the format for the district improvement plan. The district will continue to evaluate the plan's impact through a balanced scorecard and a systemwide survey and will periodically update the needs assessment and implementation steps of the subordinate plans. District representatives told TSPR that this improvement planning process has assisted the district's efforts to align support services with the schools' needs. The process requires that all subordinate action plans meet specific requirements, ensures coordination of cross-functional support services and standardizes needs assessment information. The district has made available online access to macro-level strategic plans, project overviews and detailed action plans.

### **Recommendation 11 - Reduce the number of central office positions by 3 percent to control administrative costs during a period of flat enrollment.**

By reorganizing the administrative staff and eliminating 59.5 positions in 2001-02 and 62 positions in 2002-03, the district saved nearly \$2.3 million. The superintendent's executive team is committed to continually evaluating the roles and responsibilities of each administrative position. Administrators said this ongoing evaluation should lead to the elimination of positions that do not add value or support the district's instructional programs.

### **Recommendation 23 - Prepare a short-term plan to comply with the desegregation order and request that the court immediately relinquish jurisdiction and dismiss the desegregation case against the district.**

The superintendent, his staff and general counsel conducted an analysis of the district's compliance with the 31-year old desegregation order and assert that the district is in full compliance. The superintendent has asked

the board to request that the courts dismiss the district from the desegregation order. If the district is released from the desegregation order, the superintendent said it could dedicate more resources toward remediating its low performing schools and ensure equitable treatment for all students.

## **Educational Service Delivery**

### **Recommendation 39 - Develop an automated tracking system for Special Education referrals, assessments and placements and provide monthly reports to area superintendents and principals**

With the adoption of the 2001-02 budget, the district moved forward on the development of a comprehensive tracking system for special education referrals, assessments, placements and service delivery. In October 2001, the district entered into a contract with 4GL School Solutions for the purchase and implementation of the Special Education Tracking System (SETS) and the procurement of associated hardware and software. DISD administrators said that this recommendation has helped the district to better facilitate its admission, review and dismissal (ARD) committee meetings, develop compliant and easily accessible individualized education plans and maximize revenues. These benefits will reduce the amount of staff time in meetings, reduce the burden of paperwork, improve the quality of data reported to TEA and document all eligible reimbursable services through the Children's Health Insurance Program (CHIPS) and Medicaid program. Members of the executive committee and the working committee of SETS will monitor the system for changes in local, state and federal mandates and provide for updates in both the business process and training of staff.

### **Recommendation 49 - Centralize the coordination, resource allocation and leadership of staff training efforts.**

DISD developed a training plan and now coordinates all staff training efforts through its Professional Development and Staff Training Department. Departments wishing to offer specifically-targeted training across the district must schedule all training through this department and use a standard course number. Area staff members and central training staff meet on a quarterly basis to coordinate district and campuswide training. District staff said this recommendation helped to channel staff development with the goal of improving student and academic success.

## **Community Involvement**

### **Recommendation 57 - Enhance DISD's Web site so that it can be used more effectively as a timely communications tool.**

In August 2001, the district redesigned the DISD Web site to include more timely news and information. As part of the process, new guidelines and templates for school and department information were developed. The district established an approval process that enables the schools and departments to create and update their own pages. Since June 2002, the site has had more than 650,000 hits.

## **Personnel Management**

### **Recommendation 62 - Establish effective human resource management practices and improve customer service.**

As a result of this recommendation, DISD staff said that human resources customer service is improving. The district has written, developed and communicated performance goals and objectives for staff members. As part of the pay for performance compensation study (see recommendation 66), Human Resource Services is participating in a pilot project to implement a proposed evaluation instrument based on performance goals and management.

### **Recommendation 68 - Modify district policy and guidelines to limit the amount of time employees can be placed on administrative leave with pay.**

Human Resource Services established a Risk Assessment Committee to review all administrative leave with pay requests before leave can be granted. The department implemented a 24-hour emergency removal procedure and alternative placement directive. Administrators said that implementation of this recommendation will establish increased controls to minimize the length of time for administrative leaves and saves the district money.

## **Facilities Use and Management**

### **Recommendation 79 - Restructure the operating units and reporting responsibilities under Facilities Support to provide more focus on planning, management, operations and quality control.**

The district closely reviewed its facilities organization and adjusted its method for delivering services and reallocating its resources to improve customer service delivery. The plan included restructuring or eliminating positions as well as outsourcing solutions. District facility services are now being delivered from five locations or "subdistricts." As a result of this recommendation, in September 2002, the Facilities Planning, Maintenance Services, Energy Management and HVAC departments were



restructured, eliminating 25 positions. The district took the savings and hired 44 groundskeepers.

**Recommendation 90 - Purchase and implement an integrated computerized maintenance management software package.**

The Maintenance and Technology Departments implemented an integrated computerized maintenance management software package that includes workorders, project, inventory and purchasing, equipment and labor tracking and reporting functions within an integrated business application. This has allowed the district to manage all district facilities, assets, labor costs and maintenance functions and procedures more efficiently. District administrators said that facilities support will leverage web technology to improve the service performance to schools by reducing cycle times, lowering operating costs and enhancing communications.

**Recommendation 91 - Examine and consistently apply custodial staffing formulas across the district.**

District administrators told TSPR the district became more efficient in delivering custodial services because of this recommendation. By applying its existing square footage per custodian allocation, the district prepared a school-by-school staffing efficiency and cost profile analysis. As a result, the district eliminated 95 custodian positions. DISD is currently examining whether to outsource custodial services as Houston ISD has done.

## **Asset and Risk Management**

**Recommendation 99 - Develop and maintain a comprehensive fixed asset management system, which holds employees accountable and ensures that the district's fixed assets are properly identified, monitored and safeguarded.**

**Recommendation 103 - Develop policies and procedures and assign responsibility for the safekeeping of fixed assets.**

The district has improved the way it controls and safeguards its fixed assets as a result of this recommendation. DISD implemented standard procedures for maintaining assets, converted to the General Fixed Asset Management System (GFAMS) database, complied with Governmental Accounting Standards Board Statement 34 (GASB34) standards, and properly identified and located the district's equipment. DISD has distributed copies of the new procedures to all school and maintenance personnel and informed them about the current physical inventory procedures. The district realizes that proper accountability of fixed assets

will reduce audit costs, reduce pilferage and enhance the district's image as a good custodian of taxpayer property.

## **Financial Management**

**Recommendation 105 - Work with the Technology Services Division to implement the automated, integrated budget development application.**

**Recommendation 125 - Prepare a business case, detailed study of DISD's business, control and operating environment to support a decision to purchase an integrated software system.**

The district developed a business case and purchased the Oracle financial system. The budget and financial process modules were fully implemented in October 2002, and the human resources and personnel services modules will be installed in January 2003. DISD staff said that this integrated solution will lead to a more efficient budget process and eliminate the need for many of the paper forms used to collect, compile and consolidate budget data. The district's software systems will provide a reliable record of transactions allowing staff to readily generate management reports. This should result in better decision-making tools and increased accountability.

## **Purchasing and Contract Management**

**Recommendation 129 - Renegotiate the Edison Schools, Inc., Community Education Partners and Dallas County Schools contracts to incorporate specific performance criteria and link performance measures to compensation.**

DISD closely reviewed its contracts and determined that the district could more efficiently handle outsourced services previously provided by Edison Schools, Inc. and the Community Education Partners (CEP). As a result, the CEP contract was terminated at the end of 2001-02 and the Edison contract will terminate at the end of 2002-03, saving the district approximately \$13.5 million over three years. DISD negotiated a new Dallas County Schools intergovernmental agreement to include provisions for monitoring, controlling and reporting costs. The deputy superintendent for Business Services said that this recommendation has resulted in improved overall contract management in DISD. (See recommendations 156 and 192 for related issues.)

**Recommendation 131 - Develop and implement a purchasing process that complies with the Texas Education Code, district policy and state and federal purchasing laws.**

District staff said the recommendation has simplified the commodity code system and provided a greater control mechanism for the Purchasing Department. Initially, the district eliminated 550 out of 800 commodity codes reducing the number to 250, thus simplifying end-user data input. The Purchasing Department supported this enhancement by establishing multiple district price agreements. According to DISD administration, these price agreements immediately increased the speed of the purchasing process while maintaining the integrity of compliance with federal, state and local bid laws. The new Oracle financial system, which went online in October 2002, will assist in tracking by commodity, thus aiding DISD's compliance with applicable bid laws. The Oracle system also will assist the district in taking advantage of future e-commerce possibilities.

## **Computers and Technology**

### **Recommendation 152 - Ensure that all students have equitable access to computers.**

The district formed a taskforce to determine an accurate student-to-computer ratio, developed a reporting mechanism to ensure better student access to computers and has funneled district and donated computers to schools with higher ratios. The Instructional Technology Department is currently coordinating three Telecommunications Infrastructure Fund grants and special projects seeking to improve measures in 159 schools.

### **Recommendation 154 - Require teachers to attend technology training to gain proficiency in using computer technology in the classroom.**

The district's new instructional technology program requires that teachers pass a Technology Proficiency Level 1 exam in order to be eligible for a free laptop computer to use at school or at home. By analyzing assessments from other Texas school districts and the state of North Carolina, the Instructional Technology Department also developed a technology proficiency assessment. This program will ensure a districtwide base of technology knowledge and skills. To show mastery of the Technology Proficiency Level 1, a teacher must demonstrate: knowledge of basic Windows operating system functions; basic word processing skills by making changes on a school flyer; an Internet search for resources and information; and how to generate email documents and attachments. The teacher must sign the district Electronic Communication and Data Management policy, which verifies an understanding and compliance with the district Acceptable Use Policy.

During 2001-02, DISD field-tested the assessment with five elementary schools involved in a Technology Audit Program. All teachers and administrators passed the assessment. The Instructional Technology staff

is currently modifying the document and testing instructions for districtwide implementation in 2002-03.

## **Student Transportation**

### **Recommendation 156 - Renegotiate the intergovernmental agreement with Dallas County Schools for student transportation to include provisions for monitoring and controlling costs.**

DISD renegotiated its contract agreement with Dallas County Schools for student transportation, to include provisions for monitoring, controlling and reporting costs. The initial term of the agreement is one year beginning with 2002-03 and continuing through August 31, 2003. Renewal provisions are included in the renegotiated agreement. (See recommendation 129 for related issues.)

### **Recommendation 157 - Require Dallas County Schools to implement automated routing and scheduling software.**

Dallas County Schools implemented the Routing Software System at the beginning of 2002-03. DISD will use an evaluation instrument to assess the effectiveness of the software system implemented by Dallas County Schools and its impact on student transportation.

## **Food Services**

### **Recommendation 168 - Include Food Services management in key decisions affecting the department and clarify the authority of Food Services field specialists over the day-to-day operations of their assigned school kitchens.**

The board amended its policy delegating responsibilities for personnel issues related to Food Services' technicians and assistants to the Food Services Department. DISD said that this allows Food Services to have greater control over its employees and the daily operations of the schools, relieving the campus administrator of this responsibility.

## **Safety and Security**

### **Recommendation 182 - Develop and implement a districtwide School Safety and Security inspection program.**

The district uses a standard inspection checklist to evaluate the status of physical security at district campuses and facilities. A team of security staff employees who have been selected and trained in police crime prevention and physical security methods will conduct physical security

assessments to strengthen the safety environment of campuses and facilities. This program was initiated with existing resources and staff.

**Recommendation 192 - Renegotiate the Community Education Partners contract to reflect district interests regarding accountability standards, guaranteed enrollment and contract termination.**

The board terminated its contract with Community Education Partners. The district will use these resources to begin implementing a long-range plan for disciplinary alternative education programs. The plan will include a strong behavior modification program, individualized, self-paced, computer-assisted instruction, psychological and social services, drug/alcohol intervention services, student transitioning, parental involvement and extensive staff training. The district and students will benefit from the substantial cost savings and the availability of resources to implement the long-range plan for disciplinary alternative education programs. (See recommendation 129 for related issues).

# Appendix A STATUS OF RECOMMENDATIONS AND SAVINGS

## Chapter 1: District Organization and Management

Rec. #	Recommendations	Implementation Status	TSPR Projected Five - Year Savings (Costs)	DISD Savings (Costs) to Date	DISD Projected Five - Year Savings (Costs)	Comments
1	Expand the board members' code of conduct and develop standard operating procedures. p. 35	Complete	\$0	\$0	\$0	In February 2002, the board formed a three-member ad hoc committee to establish procedures regarding expansion of the board members' code of conduct, development of a board agenda, the grievance process, election of officers, discipline issues, legal matters and resolution issues.
2	Revise the board policy on news releases to include protocols for how board members and administrators should communicate with the media. p. 37	Complete	\$0	\$0	\$0	In May 2002, the special assistant to the superintendent for Communications revised Board Policy GBBA to include a protocol for how board members and administrators should communicate with the media.
3	Request that the Commissioner of Education appoint a monitor to advise board members on governance issues. p. 39	Complete	(\$26,250)	\$0	\$0	The board president chose community leaders, other district board members and representatives from the Chamber of Commerce and the League of Women

						<p>Voters to attend the Committee of the Whole and/or regularly scheduled monthly board meetings. In July 2002, the board president appointed a three-member team to provide support and feedback regarding meetings. Evaluators will use a board-approved evaluation form. Following the Committee of the Whole meeting, the board president will send the evaluation results to each board member.</p>
4	<p>Provide specific and targeted continuing education for board members and amend board policies to require board members to attend "designated" mandatory continuing education. p. 42</p>	Complete	\$0	\$0	\$0	<p>To ensure state requirements were met by April 2002, board members identified targeted training opportunities throughout the year for continuing education and team-building sessions. The board works closely with Texas Association of School Boards (TASB) to target various training opportunities, with emphasis on the TASB Board Effectiveness Audit. Some training has already been provided and additional opportunities will be provided before the end of the year.</p>
5	<p>Maintain the board's Committee of the Whole and eliminate the</p>	Complete	\$0	\$0	\$0	<p>By September 2002, the board reorganized its committees and</p>

	remaining four standing committees. p. 44					briefing processes to maximize time spent meeting with district staff. This allowed the general superintendent and the executive leadership team to conduct district business more efficiently by reducing duplicated information requests between committees and micromanagement at the committee level. This modified version of the recommendation allows board members to interact with the general superintendent and the cabinet at the Committee of the Whole and to discuss action items that will appear at the regular board meeting.
6	Present to the board financial, management and program-related information in a summary format and use computer technology to provide detailed information. p. 45	Complete	\$0	\$0	\$0	By February 2002, the district began providing summarized financial and management information generated by its computer applications to the board. The general superintendent and the cabinet work closely with the board at monthly briefings to determine information the board requires.
7	Restructure the roles and responsibilities of support staff in the Board Services	Complete	\$450,085	\$0	\$0	By July 2002, the district restructured and redefined the roles and responsibilities of the



	Office according to functions performed and eliminate two board assistant positions. p. 48					Board Services support staff. One position was eliminated. The savings are recognized in Recommendation 11.
8	Review board travel, cell phone use and printing expenditures as part of the board's self-monitoring process and reduce the budget for board perquisites. p. 50	Complete	\$281,250	\$11,647	\$265,187	The district completed its review of board expenditures and identified alternatives to maximize efficiencies and effectiveness by May 2002. Staff prepare and distribute monthly board expenditure reports. The quarterly financial report ending February 2002 showed board expenditures are 44.4 percent of the projected budget. The goal is to reduce board perquisites by \$63,485 beginning 2002-03.
9	Conduct a strategic planning retreat to re-energize the strategic planning process and review the status of <i>Vision 2003</i> . p. 55	Complete	\$0	\$0	\$0	The district conducted a district improvement planning retreat in February 2002. The format for the district improvement plan (DIP) has been prepared and the plan was reviewed by DISD leadership. All campus improvement plans are linked with the DIP, which is available on the district's Web site.
10	Restructure DISD's organization, grouping similar administrative and operations	Complete	\$0	\$0	\$0	In December 2001, the district reorganized its departments under four demutv

	positions, reassigning essential support services to area offices and establishing formal communication protocols based on the new reporting relationships. p. 61					superintendents: Administrative Services, Instructional Services, Business Services and Human Resource and Security Services. By July 2002, it established communication protocols for the new reporting relationships.
11	Reduce the number of central office positions by 3 percent to control administrative costs during a period of flat enrollment. p. 69	Complete	\$17,481,582	\$2,272,827	\$20,206,787	As a result of the reorganization, the district eliminated 121.5 positions: 59.5 by August 2001 saving the district \$2,272,827 and 62 in 2002 saving the district \$2,210,663.
12	Define the roles and responsibilities for the central office and area offices to require that area superintendents focus on operational issues. p. 71	Complete	\$0	\$0	\$0	By August 2002, the district established joint division meetings between Administrative Services and Instructional Services to redefine employee roles, responsibilities and relationships. The implementation of the joint division meetings has resulted in improved communication and more consistent operational procedures.
13	Revise the performance evaluation instrument for central administrators to better measure the performance of employees performing non-teaching functions.	In Progress	\$0	\$0	\$0	The district addressed this recommendation through implementation of Recommendation 66.

	p. 73					
14	Redirect central office instructional specialists to the area offices to decentralize instructional support services for mathematics and science. p. 74	Complete	\$0	\$0	\$0	In October 2001, the board approved the restructuring of the organization to ensure that one mathematics instructional specialist position was redirected to each area office. All positions have been filled. Technical assistance to each campus is more effective and efficient.
15	Reassign budget analysts, employment administrators and project liaisons to area offices. p. 77	Complete	\$0	\$0	\$0	In 2001-02, each area office was assigned an employment administrator and a professional and support staff member from Campus Data Support. Employment administrators and budget specialists have been assigned with the adjusted school alignments for 2002-03. Both will attend principals' meetings as scheduled to promote communication and interaction with campuses.
16	Reestablish the principals' leadership academy to train assistant principals from within DISD to be principals and develop an in-house leadership training program for principals and area superintendents n	Complete	\$0	\$0	\$0	To help prepare 15 teachers and central administrators for open campus-based administrative positions (primarily as assistant principals and deans of instruction), the district conducted its first Campus Leadership Development

	79					Academy during 2001-02. Of the 15 participants, one received a campus position before the training was completed; 13 applied for positions; seven moved into campus-based leadership positions; and two remain in the active candidate pool to fill positions that may develop. The second Academy training will be between November 2002 and March 2003.
17	Develop a formal process for assigning and transferring principals and formally communicate this process to principals and assistant principals throughout the district. p. 80	Complete	\$0	\$0	\$0	Because of the mobility and turn-over rate of campus administrators, the district has agreed to improve the process for identifying individuals for campus-based administrator assignments/transfers based on school needs, performance indices and other factors. Guidelines, procedures and timeframes were communicated by the general superintendent. Campus administrators and site-based decision-making (SBDM) are involved in the process. Additionally, for some high profile campuses' administrative vacancies, positions have been specifically posted and interview panels

						formed to conduct screenings and make recommendations to the general superintendent.
18	Develop a formal process to allow principals to participate in the screening, interviewing and selection of assistant principals and deans of instruction before assignments are made. p. 81	Complete	\$0	\$0	\$0	By July 2002, the district outlined steps regarding the processes and timelines for reassigning and/or transferring assistant principals and deans of instruction and communicated them to current campus administrators.
19	Provide targeted training in site-based decision making to board members, central administrators, principals, teachers and School Community Councils. p. 83	Complete	\$0	\$0	\$0	By July 2002, the district provided six SBDM "Nuts and Bolts" training sessions and four content-specific training sessions for SBDM leaders in individual schools, administrators, community liaisons and community members.
20	Reduce the number of law firms contracted to provide legal services to DISD. p. 87	In Progress	\$1,203,200	\$0	\$500,000	The district hopes to reduce the number of contracted law firms by February 2003. However, to accomplish this, it must continue to decrease the amount of legal work assigned to the outside counsel. The district has not developed a request for proposal (RFP) for outside legal services. Board support in this area is critical for full implementation.
21	Develop and implement a policy requiring the	In Progress	\$0	\$0	\$0	Attorneys are currently studying other school districts'

	general counsel to assign all cases to outside counsel. p. 89					policies to draft a regulation that defines criteria for assigning cases to outside counsel. By January 2003, the district should have developed an administrative regulation regarding this issue.
22	Update the existing Microsoft Access database with the 1999-2000 outside counsel's caseload activity and related legal fees. p. 89	Complete	(\$30,000)	\$0	\$0	District staff updated the Access database with the 2000-01 caseload information.
23	Prepare a short-term plan to comply with the desegregation order and request that the court immediately relinquish jurisdiction and dismiss the desegregation case against the district. p. 93	In Progress	\$1,684,614	\$0	\$1,500,000	By August 2002, district staff and counsel will have completed their analysis of the district's compliance with the desegregation order. Upon completion of this analysis, district staff will draft compliance and retention documents for the general superintendent's and board's review and approval. Cost savings were derived from savings from not having to pay monitoring fees for the auditor and staff and reporting requirements. The implementation of this recommendation ensures equity for all students.
	<b>Totals-Chapter 1</b>		<b>\$21,044,481</b>	<b>\$2,284,474</b>	<b>\$22,471,974</b>	
	<b>All Chapters</b>	<b>Grand Total</b>	<b>\$53,825,545</b>	<b>\$10,977,182</b>	<b>\$59,953,788</b>	

## Chapter 2: Educational Service Delivery

Rec. #	Recommendations	Implementation Status	TSPR Projected Five - Year Savings (Costs)	DISD Savings (Costs) to Date	DISD Projected Five - Year Savings (Costs)	Comments
24	Require secondary schools to document how Assessment of Course Performance "blueprints" are used to guide classroom instruction. p. 105	Complete	\$0	\$0	\$0	By August 2002, the district had developed the Comprehensive Curriculum Development Plan. The curriculum/instruction and assessment staffs have met to discuss Assessment of Course Performance (ACP) changes to fit the plan. The ACP's will be available for use in 2002-03.
25	Develop and implement procedures for determining the number of projects or programs to be evaluated annually. p. 108	Complete	\$0	\$0	\$0	As of April 2002, the district had identified programs requiring evaluation components and developed detailed evaluation plans specifying goals, questions, methodologies, expected results/products and resources required to perform the evaluation. In addition, the resources to meet required evaluation commitments have been identified.
26	Develop procedures for monitoring the status of actions taken on recommendations	Complete	\$0	\$0	\$0	The assistant superintendent of Research and Evaluation developed a reporting format and schedule for

	contained in evaluation reports. p. 111					monitoring progress relating to evaluation reports. Staff examined recommendations for evaluation reports to determine the extent and number of typical recommendations and are finalizing a reporting format with accompanying procedures.
27	Develop and adopt board policies to provide direction for the management of curriculum. p. 112	Complete	\$0	\$0	\$0	In June 2001, the board approved a revised curriculum development policy (EGD Local and Regulation) that describes the curriculum philosophy and how it aligns with the district's mission. The policy also states the purpose of the district's curriculum: to guarantee a system that ensures students are taught the same core expectations at a particular grade level and in a particular course. The policy outlines the curriculum framework as well as the curriculum development roles and responsibilities of the board, the superintendent, central office administrators, principals and teachers.
28	Change the School Effectiveness Indices ratings to those used by the state accountability system and base monetary rewards on three-year	Complete	\$0	\$0	\$0	By November 2001, the district changed its School Effectiveness Indices (SEI) ratings to provide additional weights to the state accountability



	averages. p. 114					indicators. In completing its assessment, the district reviewed systems across the nation to determine what adjustments could be made, and SEIs were modified. The general superintendent approved the revised DISD rating system.
29	Identify the factors contributing to low income and ethnic minority students' low TAAS scores and develop strategies to improve the scores. p. 120	Complete	\$0	\$0	\$0	The district completed its analysis of its TAAS data to identify factors related to achievement for low income and ethnic minority students, as well as empirical characteristics of teachers and schools that are effective in improving achievement.
30	Increase emphasis on testing all students and reducing TAAS exemptions. p. 123	Complete	\$0	\$0	\$0	The district provided a testing policy to schools in spring 2001 and 2002. Status reports show increases in the total number of students tested from 2000 to 2001.
31	Ensure that DISD high school students have equal access to advanced academic courses. p. 126	Complete	\$0	\$0	\$0	By July 2002, the district expanded its Advanced Placement (AP) Incentive Program to include five additional high schools. By 2003-04, the district will have fully implemented the AP Incentive Program for all DISD high schools.
32	Increase student enrollment in the district's "recommended"	Complete	\$0	\$0	\$0	In 2001-02, the district changed its policy requiring incoming 9th grade

	and "distinguished achievement" graduation programs. p. 127					students to enroll in the recommended high school plan. To better prepare students for institutions of higher learning, the district now requires students entering 9th grade to select the Recommended or Distinguished Achievement Program. Students must remain in one of those programs at least four semesters. A change after that time period requires a parent conference and the parent's written consent. The implementation of this requirement has resulted in 84 percent of the current senior class working toward completing the Recommended or Distinguished Achievement Program.
33	Review the district's Algebra I and U.S. History curricula to ensure that they accurately reflect the material covered in end-of-course examinations. p. 129	Complete	\$0	\$0	\$0	In December 2001, the district purchased Project CLEAR documents for Algebra I and U.S. History 11th grade from Houston ISD. In August 2002, teachers received revised scope and sequences for these courses. The revised curriculum guides for both courses will be distributed to campuses in October 2002.
34	Develop strategies to increase student participation and assist students in improving their	Complete	\$0	\$0	\$0	During August through November 2002, The Meadows Foundation, State Board of Educator

	SAT and ACT scores. p. 132					Certification (SBEC), the Texas Education Agency (TEA) and Kaplan pilot helped pay for the SAT instruction. The revised curriculum for core content areas will have assessment items on higher order skills that will prepare students for the SAT and ACT college entrance exams. The district is conducting preparation sessions for students.
35	Develop and follow a schedule for the development and revision of curriculum guides. p. 136	Complete	(\$555,000)	\$0	\$0	On November 1, 2001, the district completed its first draft of the Comprehensive Curriculum Development Plan and presented it to the board on November 6, 2001. The district also presented the plan to the Districtwide Committee on December 12, 2001. In August 2002, it completed its initial distribution of syllabi, scope and sequences. Expanded curriculum guides will be distributed in October 2002. The district used existing resources to implement this recommendation.
36	Reclassify an executive-level superintendent's position as deputy superintendent of Curriculum and Instruction and assign all instructional functions and the	Complete	\$0	\$0	\$0	In January 2002, the district created a deputy superintendent specifically for Instructional Services to oversee the following departments: Curriculum and Instruction Student

	area superintendents to that position. p. 139					Support and Special Services and Program Development and Staff Training. The costs associated with implementation are part of the net calculated savings in recommendation 11.
37	Reorganize personnel and functions to provide special education services efficiently and effectively. p. 151	Complete	\$0	\$0	\$0	On September 1, 2001, the district hired a new assistant superintendent for Special Education. The assistant superintendent created area-based special education operations teams to provide assistance and support for implementation of special education programs on the campuses. This improved oversight, planning and compliance has garnered high marks from TEA in subsequent compliance visits.
38	Aggressively monitor compliance and annually train all campus personnel on the <i>Special Education Operations Manual</i> . p. 154	Complete	\$0	\$0	\$0	The Special Education Department developed a strategic plan to target six essential compliance components of the special education program. During 2001-02, TEA conducted three on-site monitoring visits to review the district's progress toward implementation of the strategic plan, which continues to be implemented, monitored and updated. The district provided administrators

						teachers and support staff training that addressed special education compliance. Tools, products and documents that supported this effort also were developed, updated and distributed. Eight multidisciplinary teams of special education staff in each of the district's eight administrative areas help guide and support campus staff to ensure the district's compliance with special education program requirements.
39	Develop an automated tracking system for Special Education referrals, assessments and placements and provide monthly reports to area superintendents and principals. p. 155	Complete	\$0	\$0	(\$5,677,009)	On October 25, 2001, the board authorized the district to negotiate and enter into a contract with 4GL School Solutions to purchase and implement the Special Education Tracking System (SETS) hardware and software. With the adoption of the 2001-02 budget, which contains \$1.7 million earmarked for the system, development of a comprehensive tracking system for special education referrals, assessments, placements and service delivery moved forward.
40	Develop procedures to correctly and equitably identify gifted and talented students in all racial and ethnic	Complete	\$0	\$0	\$0	The district selected an instrument to supplement procedures to correctly identify gifted and talented students in all racial

	groups. p. 161					and ethnic groups. The implementation of the Naglieri test began in DISD on February 1, 2002.
41	Respond to the principal recommendations of the 1996 report <i>Gifted and Talented Program Review</i> . p. 162	Complete	\$0	\$0	\$0	The district responded to recommendations based on the 1996 <i>Gifted and Talented Program Review</i> in curriculum, screening, training and program expansion.
42	Improve Career and Technology Education (CATE) strategic planning by tracking student preferences indicated on the Individual Academic and Career Plan forms and Choices sheets and comparing them with CATE offerings. p. 170	Complete	\$0	\$0	\$0	CATE staff is currently reconciling student choice sheets and adjusting course offerings for 2002-03. The district developed the program for the automated tracking system and is in the process of field testing. Students will be able to select CATE courses based on broad pathways. Counselors will have a tool to help students determine high school courses that explore broad pathways.
43	Improve middle school career exploration by installing integrated interactive career investigation laboratories in all schools. p. 172	In Progress	(\$960,000)	\$0	\$0	By May 2006, the district will have installed a new Family and Consumer Sciences lab and upgraded a Tech Education laboratory at Spence Middle School. The district also upgraded Tech Education labs at Hood, Cary, Stockard and Zumwalt middle schools, as well as Roosevelt High School and began upgrading at Anderson Learning Center. To implement this recommendation.

						the district used \$255,420 of 2001-02 federal, state and local funds budgeted to Career and Technology Education for five campuses (five-year costs will be \$1,140,000) and \$200,000 for the integrated lab in the new middle school using the bond program funds.
44	Prepare all limited English proficient students to take the TAAS by administering the Spanish TAAS and the released TAAS and use the results to plan instruction. p. 177	Complete	\$0	\$0	\$0	The district provided principals Spring 2002 testing guidelines for limited English proficient (LEP) students. The schools administered the tests in December 2001 and the results were available in January 2002. Each school took the Diagnostic Assessment of the Texas Essential Knowledge and Skills (TEKS) Objectives in December 2001 and results were available in January 2002. All items were linked to the TEKS objectives and, after the administration of the tests, student profiles by TEKS objectives were provided to the teachers. This prepared the district to identify the strengths and weaknesses for each student in preparation for the TAAS.
45	Reassign Bilingual Education (BE)/English as a Second Language (ESI) teachers to	Complete	\$0	\$0	\$0	The district implemented staffing plans for each campus. To allow teachers to

	reduce or eliminate the need for ESL waivers and to concentrate BE teachers in elementary schools with large limited English proficient populations. p. 179					concentrate on the lower grade levels and improve the quality of the instructional program for LEP students, upper grade bilingual teachers were reassigned to reduce the number of exceptions and waivers needed for the district.
46	Exit limited English proficient students from Bilingual Education/English as a Second Language programs as soon as they meet the appropriate criteria. p. 181	Complete	\$0	\$0	\$0	At the end of 2001-02, 33 percent of the elementary LEP students and 26 percent of the secondary LEP students met exit criteria, reflecting a greater number of exited students than from 2000-01.
47	Provide campus-level training to assist teachers in using best practices to improve the academic performance of economically disadvantaged students. p. 186	Complete	\$0	\$0	\$0	During 2001-02, a cooperative effort between the Professional Development and Staff Training and the Curriculum and Instruction, aligned all curriculum materials with the Texas Essential Knowledge and Skills (TEKS). In addition, campus-level and districtwide training programs were developed to help teachers provide high-quality instruction to encourage higher student achievement.
48	Relieve counselors of administrative and testing activities so that they can devote their time to providing direct services to	Complete	(\$7,023,210)	\$0	\$0	In spring 2002, the district presented its plan for an improved program to the deputy superintendent for Instructional Services and the associate superintendent for



	students. p. 198					Student Support and Special Services for inclusion in the district's 2002-03 budget. As a result, the district hired 26 new counselors and implemented several initiatives including: a review and recommendation of appropriate procedures for coordinating student testing that is done at the campus; a survey of surrounding districts about their counseling programs; a review of local, state and nationally-identified best practices for counseling programs; and determination of the district's program needs for an exemplary program. Funding to implement this recommendation came from Title I and existing general operating funds. Future costs for supplemental pay for campuses to address test coordination will be identified within existing funds.
49	Centralize the coordination, resource allocation and leadership of staff training efforts. p. 208	Complete	\$0	\$0	\$0	The district developed a districtwide training plan and now coordinates all staff training efforts through the Professional Development and Staff Training Department.
50	Conduct needs assessments and evaluate the effectiveness and quality of existing	Complete	\$0	\$0	\$0	To assist with professional development planning for 2002-03, the district conducted a

	training to improve course offerings. p. 211					training survey and needs assessment. Participants also gave feedback on training provided by the 2001-02 Professional Development and Staff Training department in 2001-02. The department is using the feedback to improve its staff development program.
51	Create a central, comprehensive course administration system for the district to schedule, register and track individual training activities. p. 214	Complete	\$0	\$0	\$0	The district installed an electronic telephone registration system and provides training attendance reports to campus principals and teachers for review. The course administration system will go online January 2003.
52	Use innovative delivery methods for staff training. p. 216	Complete	\$0	\$0	\$0	The Professional Development and Staff Training department used a variety of delivery methods in 2001-02 to provide distance learning. In July 2002, the district implemented the online training program, Foundations of Organized Classrooms: Understanding the Strategies (FOCUS). This program provides an overview of classroom management strategies and district resources for teachers new to the district. Administrators are able to review videos when time permits, and they don't have to travel to attend

						conferences, which saves the district money. All teachers received training in 2001-02 with 95 percent in compliance with the district's mandatory training requirement.
53	Assess teacher support programs and set goals and strategies for the program. p. 219					The district revised its Grow Your Own requirements to attract more employees into the program. It conducted a districtwide information fair. In addition, the district formed new partnerships and negotiated two pending partnerships to strengthen ties with universities/student teacher programs. Increased collaboration with deans of nearby universities has increased efforts to attract more student teachers to DISD campuses. In January 2002, the district established the New Teacher Initiatives Department to provide support for new teachers and retain them. Participating teachers will receive a stipend for their work with student teachers.
	<b>Totals-Chapter 2</b>	Complete	(\$151,220)	\$0	\$0	
			<b>(\$8,689,430)</b>	<b>\$0</b>	<b>(\$5,677,009)</b>	
	<b>All Chapters</b>	<b>Grand Total</b>	<b>\$53,825,545</b>	<b>\$10,977,182</b>	<b>\$59,953,788</b>	

## Chapter 3: Community Involvement

Rec. #	Recommendations	Implementation Status	TSPR Projected Five - Year Savings (Costs)	DISD Savings (Costs) to Date	DISD Projected Five - Year Savings (Costs)	Comments
54	Combine the duties performed by the executive director and director of Community Relations and eliminate the executive director position. p. 230	Complete	\$365,535	\$0	\$0	With the reorganization of the Community Relations Department, two interim directors moved to other departments. The department merged two positions into one, creating the executive director of Community Relations.
55	Develop and implement an annual operating plan to provide strategic focus for the Communications Department. p. 233	Complete	\$0	\$0	\$0	By July 2002, the Communications Department developed a strategic operating plan and presented it to campus administrators.
56	Develop strategies and goals for improving districtwide internal and external communications. p. 237	Complete	\$0	\$0	\$0	Communications' operations have been vastly improved by the implementation of its publications plan. The launch of a new parent publication and enhancements to the district's Web site have expanded the district's

						audience and access to information.
57	Enhance DISD's Web site so that it can be used more effectively as a timely communications tool. p. 241	Complete	\$0	\$0	\$0	By July 2002, Communications had revamped and improved its Web site, increasing linkages and providing the ability to update information daily.
58	Discontinue the use of the unofficial name "Dallas Public Schools." p. 242	Complete	\$0	\$0	\$0	Effective December 2001, the district officially changed its name to Dallas Independent School District. The district's external publications now reflect the official name of the district.
59	Develop formal guidelines for sunseting and restructuring districtwide advisory committees and establish well-defined oversight authority within the district's management structure. p. 259	Complete	\$0	\$0	\$0	After reviewing the performances and feasibility of each advisory committee, in July 2002, the Department of Community Relations recommended eliminating unnecessary committees and merging other committees for more effective use and interaction of community members.
60	Eliminate DISD's contracted outreach services with local chambers of	Complete	\$1,075,000	\$0	\$0	For 2001-02, DISD retained its contracted outreach services

	commerce. p. 261					with local chambers of commerce. In July 2002, the district revised its contracts to assign accountability and redirect chamber efforts toward assisting the district with involvement of Minority Woman Business Enterprise vendors. The district will write its parental involvement measures by December 2002.
61	Establish a task force to work with principals and volunteers at schools without structured parental involvement organizations to ensure that all schools have active organizations by 2003. p. 263	Complete	\$0	\$0	\$0	The Dallas Council of PTAs continues to coordinate strategies and training for schools and provides support for implementation.
	<b>Totals-Chapter 3</b>		<b>\$1,440,535</b>	<b>\$0</b>	<b>\$0</b>	
	<b>All Chapters</b>	<b>Grand Total</b>	<b>\$53,825,545</b>	<b>\$10,977,182</b>	<b>\$59,953,788</b>	

## Chapter 4: Personnel Management

Rec. #	Recommendations	Implementation Status	TSPR Projected Five-Year Savings (Costs)	DISD Savings (Costs) to Date	DISD Projected Five-Year Savings (Costs)	Comments
62	Establish effective human resource management practices and improve customer service. p. 278	Complete	\$0	\$0	\$0	The district has developed written performance goals and objectives and communicated them to all staff members. In December 2001, the district completed the renovation of the Human Resource Department. The department installed kiosks outside the department to help communicate human resource issues and, utilizing existing resources, made improvements to the call center.
63	Consolidate and update district policies and guidelines into one employee handbook. p. 280	Complete	\$0	\$0	\$0	In August 2002, the district completed its employee handbook. After the general superintendent's Executive Team and Legal Services review it for compliance-related issues and receive TASB approval, it will be posted online with links to TASB.
64	Develop a standard operating	Complete	\$0	\$0	\$0	Human Resource Services

	procedures manual for the Human Resource Services department p. 281					completed final revisions to the procedures manual in August 2002. Each executive manager has a copy and is responsible for disseminating information to his or her respective staff members. The procedures manual is accessible via a dedicated drive within the HR computer system and will be moved to the new Oracle system in January 2003.
65	Discontinue the practice of routinely issuing employment contracts to non-certified professional employees. p. 283	Complete	\$0	\$0	\$0	In February 2002, the board approved policy changes to employee contracts. In April 2002, the district completed its review of its practice of issuing employment contracts to non-certified professional employees. Two employee contracts, educator and employee, were reduced in length; however, the district did not reduce the number of contracts after implementation. Central administrators now receive a one-year contract.
66	Create a pay for performance	In Progress	\$0	\$0	(\$14,500,000)	The district agreed that its



	<p>compensation plan. p. 285</p>					<p>entire compensation structure needed restructuring. By May 2003, the district will present its recommendations to the board. The completed study will include revised job titles, job descriptions and new compensation schedules as well as changes to the performance appraisal process for central administrators and possibly to a performance-for-pay plan. An RFP was issued for 2001-02 for a district compensation study. Using existing resources, the district hired Deloitte and Touche in February 2002 at a cost of \$240,000. Additionally, the district's reorganization in August 2002 designates an executive manager of Total Rewards who heads the Benefits and Compensation departments and guides the redesign of the district compensation plan. Human Resource Services has enlisted the</p>
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						assistance of a consultant to design a performance appraisal instrument, which will include a balanced scorecard. It is anticipated that this instrument will be piloted for use for appraisal purposes in 2002-03. (See Recommendations 13, 67 and 184.)
67	Grant annual car allowances for personal vehicle use to executive level positions only with exceptions for other positions when required travel is properly documented and justified. p. 288	In Progress	\$1,960,637	\$0	\$0	The district addressed this recommendation through implementation of Recommendation 66.
68	Modify district policy and guidelines to limit the amount of time employees can be placed on administrative leave with pay. p. 291	Complete	\$500,000	\$463,519	\$2,317,595	Human Resource Services established a Risk Assessment Committee to review all administrative leave with pay requests before leave could be granted. HRS continually tracks and monitors persons on leave and documents this in reports to the deputy superintendent of Human Resource Services. The department completed its review and analysis of current policies about support staff and

						related administrative leave procedures and forwarded its recommendations to the general superintendent.
69	Obtain legal advice and establish a district policy regarding DISD staff performing their same job through a temporary employment agency. p. 292	Complete	\$0	\$0	\$0	In December 2001, Human Resource Services drafted a memorandum that prohibits staff from engaging the services of temporary agencies which employ DISD employees in the same job capacity that they perform during the workday. After seeking legal advice, the district issued an administrative directive. All affected departments and temporary agencies have been notified of the directive.
70	Conduct an annual evaluation of the recruitment programs and staffing projections. p. 299	Complete	\$0	\$0	\$0	Using information from the New Teacher Project and the McKinsey Report, Human Resource Services developed and continues to monitor the recruitment program. Employment administrators received training in best practices and HR-developed performance goals and objectives. The district

						presented a recruitment report to the board on February 12, 2002. The board received a quarterly report in May 2002 and a business briefing in August 2002. The district began 2002-03 with a record low 28 teacher vacancies. The district attributes its success to the improved procedures and application process.
71	Develop selection criteria and documented procedures to hire employees and process employment applications. p. 302	Complete	\$0	\$0	\$0	By October 2001, the district had developed procedures and processes to streamline the application and hiring process. As the district implemented the new procedures, modifications were made as needed. Enhancements made on the district's Web site have enabled 78 percent of prospective teachers to submit applications online.
72	Require campus administrators and teachers to use the district's automated substitute calling system for teachers. p. 304	Complete	\$0	\$0	\$0	By December 2001, the district had provided training and directed all campus administrators to use the substitute calling system. The district

						regularly monitors the use of the system; reports are generated for the area superintendents.
73	Develop an evaluation tool for substitute teachers that is completed at the end of each assignment. p. 305	Complete	\$0	\$0	\$0	By December 2001, the district had developed a form for campuses to evaluate substitute teachers. By randomly evaluating some substitutes, the district was able to detect unsatisfactory performances as well as develop a preferred substitute list. The district continues to conduct random evaluations of substitutes and continues to provide ongoing substitute teacher candidates.
74	Conduct exit interviews with all departing DISD employees and reformat the follow-up survey report to capture summary level information on the reasons employees leave the district. p. 307	Complete	\$0	\$0	\$0	In November 2001, the district revised its surveys from departing teachers to include recommendations from the New Teacher Project and the McKinsey Report. Now the district can capture the reasons why teachers leave the district and identify trends or areas of concern.
75	Aggressively develop, implement and	Complete	\$0	\$0	\$0	As of March 31, 2002, the Records Management Task

	support a quality, ongoing records management program, in compliance with the state public government records guidelines. p. 310					Force competitively procured professional records management services from Records Consultants, Inc. The district updated its records management policies and procedures, developed a retention schedule and is currently conducting training for its records custodians. The district has located a facility to house central records management.
76	Maintain personnel files in a consistent and legally compliant manner. p. 314	Complete	(\$7,456)	\$0	\$0	The district has revised its procedures for cataloging, organizing, releasing, restricting and accessing files. DISD plans to scan documents to improve accessibility for employment administrators.
77	Complete software and equipment upgrades and work closely with the districtwide information technology assessment effort. p. 316	In Progress	(\$20,000)	\$0	\$0	In January 2003, the district will bring online the Oracle systems in the Human Resources, Finance and Payroll departments. The WinOcular upgrade is operational with plans for

						continued enhancement.
78	Image all documents as received to ensure up-to-date backup of documents in case of record destruction or loss. p. 317					As of July 2002, the executive director of Districtwide Records Management and the chief technology officer created the Districtwide Scanning Committee to study the issue of scanning all documents and document-management software. DISD brought in top industry performers to demonstrate their products to committee members and other interested parties. The Districtwide Records Management Department is currently developing a plan and cost study for the implementation of districtwide records management and imaging services.
	<b>Totals-Chapter 4</b>	Complete	\$0	\$0	\$0	
			<b>\$2,433,181</b>	<b>\$463,519</b>	<b>(\$12,182,405)</b>	
	<b>All Chapters</b>	<b>Grand Total</b>	<b>\$53,825,545</b>	<b>\$10,977,182</b>	<b>\$59,953,788</b>	

## Chapter 5: Facilities Use and Management

Rec. #	Recommendations	Implementation Status	TSPR Projected Five - Year Savings (Costs)	DISD Savings (Costs) to Date	DISD Projected Five - Year Savings (Costs)	Comments
79	Restructure the operating units and reporting responsibilities under Facilities Support to provide more focus on planning, management, operations and quality control. p. 326	Complete	\$0	\$0	\$0	In April 2002, the Facilities Planning, Maintenance Services, Energy Management and HVAC departments submitted a restructuring plan for executive level review and approval. DISD eliminated 25 positions and used the savings to hire 44 groundskeepers. This recommendation was fully implemented by September 2002.
80	Use the data from the Functional Equity Study to develop long-term strategies to upgrade facilities. p. 330	Complete	\$0	\$0	\$0	In January 2002, DISD completed its facilities master plan in conjunction with the 2002 bond program planning effort.
81	Complete the planning components necessary for a fully integrated 10-year facilities master plan. p. 333	Complete	(\$50,000)	\$0	\$0	In January 2002, the Future Facilities Task Force completed a district needs assessment before the successful January 19, 2002 bond election



						<p>All planning components completed to date were accomplished using internal resources; no consultant expenses were incurred. In December 2002, the Future Facilities Task Force will present the master facilities plan to the general superintendent. An electronic version will also be available on the Web site. To gather community input, the district plans to conduct a series of town hall meetings.</p>
82	<p>Develop prototypical designs for educational facilities that provide flexibility in responding to site and neighborhood concerns and save the cost of additional design fees each time a new school is built. p. 335</p>	Complete	\$0	\$0	\$0	<p>By July 2002, the district had developed prototype designs for future building projects. The prototype approach is being considered for the construction of 16 new elementary schools.</p>
83	<p>Conduct post-occupancy evaluations of major construction projects. p. 337</p>	Complete	(\$750,000)	\$0	\$0	<p>By February 2002, the district had conducted post-occupancy reports of its construction projects. The post-occupancy reports have been reviewed and</p>

						comments were incorporated into the School Design and Technical Standards. The state had estimated that an evaluation by an external consultant would cost the district \$750,000; however, district staff conducted the evaluation with existing resources.
84	Develop a plan that addresses the quality and construction of portable buildings based on the length of time they realistically will remain in service. p. 339	Complete	\$0	\$0	\$0	In May 2002, the district developed a management maintenance report to be included in the planning and scheduling of the bond program capital improvement activities.
85	Redraw the boundaries for high school clusters and middle and elementary schools. p. 350	Complete	\$0	\$0	\$0	By July 2002, the district identified the preferred school grade configurations and announced the necessary new schools and classroom additions to include in the bond program. DISD is currently implementing a five-year boundary plan.
86	Conduct a comprehensive audit of utility and custodial costs associated with after-school	Complete	\$0	\$0	\$0	By July 2002, Auxillary Services had completed its study of after-school facilities

	facilities use and modify fee policies as required. p. 353					use. Through a cost-comparison study of rental fees and utility/custodial costs of five randomly - selected schools, DISD determined that the estimated rental fee charges were sufficient to cover associated utility and custodial costs and, therefore, did not increase rental fees.
87	Eliminate the staff in DISD's Bond Office until the district undertakes another major capital improvement program. p. 354	Complete	\$1,212,075	\$292,982	\$292,982	In December 2001, the district eliminated its Bond Office; all staff were reassigned to other departments. However, after the passage of the January 2002 bond package, the district reopened its Bond Office. (Costs savings are included with Recommendation 11.)
88	Conduct programming studies as a prerequisite to funding for all projects. p. 357	Complete	\$0	\$0	\$0	In July 2002, the district completed its programming studies plan and is using the data.
89	Develop a districtwide preventive maintenance program as part of realigning the district's maintenance and operations staffing and budget. p. 362	Complete	\$0	\$0	\$0	In February 2002, the district implemented a preventive maintenance program and included a draft schedule in the restructure plan.

90	Purchase and implement an integrated computerized maintenance management software package. p. 364	In Progress	(\$250,000)	\$0	(\$1,800,000)	The Maintenance and the Technology departments reviewed the existing integrated computerized maintenance management system. In April 2002, the district evaluated proposals for a Computerized Maintenance Management System. In October 2002, Maintenance and Technology will present recommendations to the board.
91	Examine and consistently apply custodial staffing formulas across the district. p. 373	Complete	\$13,947,738	\$0	\$7,414,080	By February 2002, the district had conducted an allocation audit for all schools using the existing square footage to target staff reductions and a school-by-school staffing efficiency and cost profile analysis and academic and administrative facilities assessment using the Association of Higher Education Facilities Officials guidelines. DISD will fully implement the new staffing formulas in 2002-03. The district has

						eliminated 95 custodians and is currently examining outsourcing options adopted by Houston ISD.
92	Increase the role of lead custodians in approving maintenance and repair work. p. 375	Complete	(\$138,325)	(\$14,663)	(\$73,315)	In December 2001, the Maintenance Department created a maintenance/lead custodian-training manual and a schedule for lead custodial training.
93	Conduct a districtwide energy management audit and develop a strategic energy management plan. p. 381	In Progress	\$0	\$3,019,665	\$6,794,247	In April 2002, DISD received seven proposals in response to a request for proposal for energy management audit services to help the district develop a comprehensive energy management plan. The Proposal Evaluation Committee made its recommendation to the board in October 2002. The district also has partnered with 61 school districts and other political subdivisions to form the Texas Conference of Urban Counties Aggregation Project, Inc. (TCAP). TCAP negotiated utility rates that will

						result in substantial savings over 18 months.
94	Involve schools in energy conservation. p. 383					After reviewing the Watt Watchers and Energy Education Outreach programs, the assistant superintendent for Facilities Support recommended that schools implement the Watt Watchers Program. By April 2002, the Energy Management Department visited the 51 schools initially enrolled in the Watt Watchers and is currently instructing the remaining 164 schools about the program. The district attributes the cost savings to reduced per kilowatt usage realized when vending machine lights are disconnected.
		Complete	\$365,000	\$0	\$365,000	
	<b>Totals-Chapter 5</b>		<b>\$14,336,488</b>	<b>\$3,297,984</b>	<b>\$12,992,994</b>	
	<b>All Chapters</b>	<b>Grand Total</b>	<b>\$53,825,545</b>	<b>\$10,977,182</b>	<b>\$59,953,788</b>	

## Chapter 6: Asset and Risk Management

Rec. #	Recommendations	Implementation Status	TSPR Projected Five - Year Savings (Costs)	DISD Savings (Costs) to Date	DISD Projected Five - Year Savings (Costs)	Comments
95	Ensure that employee benefits are effectively planned, designed, funded, administered and evaluated. p. 397	Complete	\$0	\$0	\$0	In April 2001, the district formed a task force to review employee benefits and fully implemented this recommendation.
96	Strengthen tax annuity program guidelines to include compliance testing processes and improve communication of guidelines to vendors and employees. p. 398	Complete	\$0	\$0	\$0	As a result of recent legislative changes, the district reviewed these changes and the administrative impact before final program changes were made in August 2002.
97	Modify the payroll software to make correct deductions for employee tax-sheltered annuities. p. 399	Complete	(\$150,000)	\$0	\$0	Once the new Oracle system is implemented in January 2003, the new payroll system will not require any modification to handle this process.
98	Review the district's potential civil and professional liability risks for board members and employees and develop a strategy for insuring those risks. p. 405	Complete	\$0	\$0	\$0	In June and November 2001, DISD issued two RFPs for liability insurance. After a careful review of feasibility and costs, the district will make a decision

						regarding this issue.
99	Develop and maintain a comprehensive fixed asset management system, which holds employees accountable and ensures that the district's fixed assets are properly identified, monitored and safeguarded. p. 412	Complete	\$0	\$0	\$0	The district converted to the new General Fixed Asset Management System (GFAMS) fixed assets system in compliance with GASB34 in April 2002. The district distributed copies of the new manual to all school and maintenance personnel. In addition, all schools and administrative offices were notified of the current physical inventory procedures.
100	Annually perform a physical inventory of all fixed assets. p. 413	Complete	\$0	\$0	\$0	By April 2002, the district had completed its physical inventory of administrative facilities and all school campuses.
101	Reconcile subsidiary and school inventory records to the master inventory listings on a periodic basis. p. 413	Complete	\$0	\$0	\$0	By April 2002, the district had reconciled all school inventory records with those on the master inventory list. The district is reconciling its subsidiary records of fixed assets on a monthly basis and has affixed bar-coded DISD identification



						tags on equipment and created required classification codes for all categories of district fixed assets.
102	Update inventory records to include cost or fair market value, age and useful life information to be in compliance with Governmental Accounting Standards Board Statement 34. p. 414	Complete	\$0	\$0	\$0	The district created a subsidiary ledger for equipment valued at \$5,000 or more per unit in compliance with GASB 34. The district has employed a consultant to assist in complying with GASB 34 rules.
103	Develop policies and procedures and assign responsibility for the safekeeping of fixed assets. p. 415	Complete	\$0	\$0	\$0	In July 2001, the district developed and distributed a new fixed assets policies and procedures manual.
104	Develop improved procedures to ensure all fixed assets are tagged and placed on the fixed asset control system. p. 416	Complete	\$0	\$0	\$0	The district has tagged and inventoried all equipment that did not have a bar code.
	<b>Totals-Chapter 6</b>		<b>(\$150,000)</b>	<b>\$0</b>	<b>\$0</b>	
	<b>All Chapters</b>	<b>Grand Total</b>	<b>\$53,825,545</b>	<b>\$10,977,182</b>	<b>\$59,953,788</b>	

## Chapter 7: Financial Management

Rec. #	Recommendations	Implementation Status	TSPR Projected Five-Year Savings (Costs)	DISD Savings (Costs) to Date	DISD Projected Five-Year Savings (Costs)	Comments
105	Work with the Technology Services Division to implement the automated, integrated budget development application. p. 440	In Progress	\$0	\$0	\$0	This item will be included during the implementation of the general ledger piece of the Oracle system in October 2002.
106	Make the budget document submitted for Association of School Business Officials and Government Finance Officers Association certification available to the public in both printed form and on the district's Web site. p. 441	Complete	\$0	\$0	\$0	Following standards set by the Government Finance Officers Association and the Association of School Business Officials, the district implemented timelines as of January 2002 for submitting budget documents within 90 days following adoption. In addition, the budget document is available in print or on the district's Web site.
107	Link the budget to specific goals and objectives identified in DISD's strategic plan. p. 442	Complete	\$0	\$0	\$0	The district budget is linked to district goals and objectives. This recommendation is related to the strategic plan discussed in

						Recommendation 9.
108	Develop a districtwide financial management policies and procedures manual. p. 444					In order to incorporate new processes and controls that are being developed in conjunction with the implementation of a new comprehensive Oracle software package, the district has delayed the revision of the procedures manual. The district has updated the current instruction manual, "Essential Administrative Handbook for Critical Financial Activities" to include current practices that will provide a preliminary basis for the new manual. In addition to procedures, policies and instructions, the new manual will include screen prints and sample reports with written explanations. The district will distribute manuals to Payroll and Human Resource Services by April 2003.
		Complete	\$0	\$0	\$0	
109	Develop a comprehensive	Complete	\$0	\$0	\$0	The district developed and

	plan to review and implement recommendations from both internal and external audits and reviews, and expand and enforce the provisions of board regulation CFC. p. 447					implemented a comprehensive audit plan in November 2001. Currently, the board and general superintendent receive quarterly internal and external audit reports.	
110	Build checks and balances into the current Purchasing, Accounts Payable and General Accounting procedures and eliminate the department created as a solution to weak internal controls. p. 451	Rejected		\$360,880	\$0	\$0	The district rejected this recommendation and continues to operate the Quality Control Department as the best means to verify district transactions.
111	Consolidate supplemental pay codes and implement Internal Audit Department recommendations. p. 454						By January 2002, the district had implemented the Internal Audit recommendations and conducted training sessions for all subdistrict and central office staff. A committee is reviewing overtime and supplemental pay and will be recommending districtwide procedures to request time and process these payments. The committee also will recommend standard terminology and procedures for coding supplemental pay.
		Complete		\$0	\$0	\$0	

112	Purchase lockable bank-bag type envelopes for payroll transmittal. p. 456	Complete	(\$37,500)	\$0	\$0	The district purchased tamper-resistant payroll bags for all campuses in September 2001. In January 2003, DISD will begin using Oracle Time and Labor that will allow online input of absences by office managers and approvals by principals and department heads, eliminating the need for the bags.
113	Hold immediate supervisors responsible for notifying the Payroll Department of employee terminations, and reduce their department's budget by the amount of overpayments for which they are responsible. p. 457	Complete	\$0	\$0	\$0	As of September 2002, the district had instructed all principals to notify Payroll of employee terminations. With the implementation of Oracle, principals and department heads will be able to generate electronic notifications regarding employee employment status. Oracle Time and Labor will also be used to help reduce the number of overpayments. The approver will have access reports to quickly determine if an employee is not being reported as being separated.
114	Expand direct deposit marketing	Complete	\$0	\$0	\$0	As of September 2001 the district

	efforts through the use of the district Intranet, weekly publications, incentives, partnerships with banking institutions and a "direct deposit week." p. 459					made available direct deposit information via the Intranet and also communicated this information in its quarterly publication, "Communicator." Payroll employees are contacting employees who are not on direct deposit to encourage them to sign up.
115	Work with the Technology Services Division to improve deficiencies in the accounts payable system and ensure that any request for proposals (RFP) for a new system fully addresses employees' issues and concerns. p. 462	Complete	\$0	\$0	\$0	The district began implementation of the new Oracle financial system in October 2001. Staff attended training and worked with the consultant assigned to the Accounts Payable module. Full implementation should occur by fall 2002.
116	Centralize middle and high school activity fund administration under five area business managers. p. 469	In Progress	(\$1,080,637)	\$0	\$0	DISD has not yet determined whether it can fund five area business manager positions. However, DISD will continue to investigate the feasibility of this recommendation through a committee consisting of principals and area superintendent staff from the

						Activity Fund Task Force, who worked with Internal Audit, the chief financial officer, chief of staff and deputy superintendents.
117	Target activity fund audits based on in-depth risk assessments and establish a staggered audit schedule. p. 472	Complete	\$0	\$0	\$0	By August 2002, the board amended its policy allowing for staggered audits of activity funds and established an audit schedule.
118	Use the full capabilities of the activity fund software and require all schools to use the system. p. 475	Complete	(\$20,644)	\$0	\$0	As of June 2002, all schools are required to use the activity funds software.
119	Require at least two signatures on activity fund checks. p. 476	Complete	\$0	\$0	\$0	In September 2001, the district amended its activity funds procedure manual to require two signatures on checks.
120	Reconcile differences between campus student activity ledgers and the district's general ledger and hold principals accountable for the accuracy of the reports. p. 477	Complete	\$0	\$0	\$0	In September 2001, all principals became accountable for the accuracy of their student activity ledgers. The Quality Control Activity Funds Section reports any reconciling discrepancies in these reports to the area superintendents.
121	Immediately begin implementation of	Complete	\$0	\$0	\$0	The district assigned the near

	the Institute of Internal Auditors' peer review recommendations. p. 483					review recommendations and prepared a status report in September 2002.
122	Strengthen the link between the internal audit risk assessment and the audit plan. p. 484	Complete	\$0	\$0	\$0	The district developed its 2002 project plan with links to the risk assessment.
123	Complete the timekeeping database to track actual internal audit hours by project and by staff member. p. 485	Complete	\$0	\$0	\$0	In September 2001, the district completed and implemented its timekeeping database.
124	Establish a formal professional development program within the Internal Audit Department. p. 487	Complete	\$0	\$0	\$0	Effective September 2001, the district completed a formal training plan based upon staff needs.
125	Prepare a business case, detailed study of DISD's business, control and operating environment to support a decision to purchase an integrated software system. p. 489	Complete	\$0	\$0	\$0	The district selected a vendor to install the Oracle software and upgrade the districts' business and operating environment. The Oracle budget and financial modules will be fully implemented in fall 2002, and human resources and personnel modules will be implemented in January 2003.
126	Transfer external audit oversight responsibilities from the chief financial officer to the board. p. 490	Complete	\$0	\$0	\$0	In May 2002, the board assumed oversight responsibility for external audit.
127	Examine the PFIMS data	Complete	\$0	\$0	\$0	As a result of recommendations



	reporting process and implement the recommendations made in previous studies to ensure the accuracy of data reported to the Texas Education Agency. p. 493					made in previous studies (particularly one by Moak, Casey and Associates), the DISD Internal Audit department conducted a review of the Public Education Information Management System (PEIMS) reporting process. Internal Audit presented the results of the review to the board. At this time, eight of 12 recommendations have been fully implemented.
	<b>Totals-Chapter 7</b>		<b>(\$777,901)</b>	<b>\$0</b>	<b>\$0</b>	
	<b>All Chapters</b>	<b>Grand Total</b>	<b>\$53,825,545</b>	<b>\$10,977,182</b>	<b>\$59,953,788</b>	

## Chapter 8: Purchasing and Contract Management

Rec. #	Recommendations	Implementation Status	TSPR Projected Five - Year Savings (Costs)	DISD Savings (Costs) to Date	DISD Projected Five - Year Savings (Costs)	Comments
128	Establish a purchasing infrastructure that enforces policy and control procedures. p. 514	Complete	\$0	\$0	\$0	In June 2002, the district concluded its review and revision of by local Board Policy CH local based on TEA guidelines and format. Legal staff is currently reviewing control procedures contained in the purchasing manual. (Also related to Recommendation 131.)
129	Renegotiate the Edison Schools, Inc., Community Education Partners and Dallas County Schools contracts to incorporate specific performance criteria and link performance measures to compensation. p. 515	Complete	\$0	\$630,000	\$14,146,800	DISD closely reviewed its contracts and determined that outsourced services from both Edison Schools, Inc. and the Community Education Partners (CEP) could be more efficiently handled by the district. As a result, the CEP contract was terminated at the end of 2001-02 and the Edison contract will terminate at the end of 2002-03. Termination of the Edison

						contract will save the district more than \$13.5 million over three years (6,400 students x \$704 per student x 3 years). The district negotiated the Edison Adjustment Factor down to 3 percent, which saved the district \$630,000 during 2001-02. DISD negotiated a new Dallas County Schools intergovernmental agreement to include provisions for monitoring, controlling and reporting costs. As a result of this recommendation, overall contract management has improved in DISD. (See Recommendations 156 and 192 for related issues.)
130	Eliminate inefficiencies in the procurement process and develop a comprehensive purchasing strategy. p. 519	Complete	\$0	\$0	\$0	By July 2002, the Purchasing Department had initiated steps to review areas of inefficiencies and developed recommendations for ongoing managerial review.
131	Develop and implement a purchasing process that complies with the Texas Education Code, district policy and state and federal purchasing laws. p. 521	Complete	\$0	\$0	\$0	By July 2002, the district had reduced commodity codes from 800 to 550 and established new price agreement contracts, which will help it

						comply with the Texas Education Code as well as district policy and state and federal purchasing laws.
132	Develop a formal vendor evaluation process. p. 523	Complete	\$0	\$0	\$0	By January 2002, the district had appointed a customer service coordinator to maintain a customer service database and formed commodity teams that meet quarterly to review commodity codes, e-commerce options, vendor issues and requirements for future price agreements.
133	Implement e-commerce technology to improve the purchasing process. p. 525	Complete	\$0	\$0	\$0	DISD's e-commerce technology and automation of all its procurement practices will be addressed in the Oracle system implementation in October 2002.
134	Update the Purchasing Department's policy and procedures manual. p. 526	Complete	\$0	\$0	\$0	The district updated its purchasing policies and procedures manual in May 2002.
135	Develop procedures for approving the addition of vendors to the database. p. 528	Complete	\$0	\$0	\$0	Effective December 2001, the district requires new vendors to complete a district vendor database form accompanied by a

						copy of their federal tax identification certificate or social security card and an original signature. The district will purge from their database any vendors with incomplete information or those who the district has had no activity with over a 24-month period. The vendor database will be audited annually.
136	Require all schools to use procurement cards for purchases of \$1,000 or less. p. 530	Complete	\$0	\$0	\$0	Memorandums were sent to non-cardholder principals directing the principals to use procurement cards for purchases of \$1,000 or less. The Executive Team and board reviewed and approved the memorandum's directive.
137	Eliminate or reduce the Service Centers' supply warehouse operations and implement an effective inventory management system. p. 535	Complete	\$10,050,460	\$0	\$0	The district implemented new procedures on November 11, 2001 that deleted 656 items from inventory. The district intends to implement just-in-time delivery that will reduce staff and facility space needs and result in significant savings to the district.
138	Develop and	Complete	(\$644,175)	\$0	(\$3,182,799)	The director of

	implement a department-wide fleet replacement schedule. p. 537					the Environmental Service Division submitted vehicle replacement criteria to the board. The replacement criteria was applied to the entire DISD fleet (606 vehicles) resulting in a considerably higher cost estimate. The board approved the criteria on March 29, 2001, and the district is implementing the schedule.
139	Automate the districtwide textbook inventory system to improve textbook tracking. p. 541	Complete	\$975,705	\$0	\$0	When the new Oracle inventory module becomes implemented, the district will fully automate its textbook inventory.
140	Perform an annual physical inventory of all textbooks and implement periodic cycle counts to ensure inventory accuracy and accountability. p. 543	Complete	\$0	\$0	\$0	The district completed its manual textbook inventory on December 7, 2001.
141	Operate the Graphics Department as a full cost-reimbursement internal service fund. p. 546	Complete	\$0	\$0	\$0	In September 2001, the director of Graphics updated the price sheet for cost reimbursement and communicated the change to all user departments.
	<b>Totals-Chapter 8</b>		<b>\$10,381,990</b>	<b>\$630,000</b>	<b>\$10,964,001</b>	
	<b>All Chapters</b>	<b>Grand Total</b>	<b>\$53,825,545</b>	<b>\$10,977,182</b>	<b>\$59,953,788</b>	

## Chapter 9: Computers and Technology

Rec. #	Recommendations	Implementation Status	TSPR Projected Five - Year Savings (Costs)	DISD Savings (Costs) to Date	DISD Projected Five - Year Savings (Costs)	Comments
142	Prepare a business case analysis to determine the most appropriate administrative technology solution for the district. p. 565	Complete	\$0	\$0	\$0	By July 2001, the district had developed a business case and recommended Oracle for its financial, human resources and payroll systems.
143	Develop a districtwide project management methodology. p. 568	Complete	(\$29,520)	\$0	\$0	By May 2002, the district had created the Project Management Services, hired an executive manager to run the office and developed methodologies and guidance for districtwide application. This new position is accounted for in the net savings in Recommendation 11. There were no software costs to the district.
144	Create a single group for desktop support services. p. 569	Complete	\$301,950	\$0	\$0	By July 2001, the district had eliminated one analyst position, trained Desktop Support staff and developed a plan for assigning service requests to all in Desktop Support staff. Savings realized from this recommendation are

						included in Recommendation 11.
145	Place the management of the switchboard operators of the telephone system within the Technology Services Division. p. 570	Complete	\$0	\$0	\$0	By September 2001, the district had added Technology Services to the Business Services Division and reorganized the switchboard operators in the Districtwide Support and Customer Service Center Department to enhance customer service.
146	Transfer all Information Technology employees to the Technology Services Division. p. 571	Complete	\$0	\$0	\$0	The district studied the feasibility of transferring all Information Technology employees to the Technology Services Division. However, it determined that other than the Financial Services information technology group, all other individuals would remain in their current department.
147	Double the number of teacher technologists employed by DISD. p. 573	Complete	(\$2,200,000)	\$0	(\$1,367,400)	District staff studied the feasibility of funding more teacher technologists positions, but determined that the number of teacher technologists per school will remain the same. The district will add technical staff for Desktop Support. In November 2002, staff will provide its final feasibility



						report, including a projected five-year cost estimate, to the general superintendent.
148	Develop internal service level agreements between the Tech Services Group and its customers. p. 574	Complete	\$0	\$0	\$0	Effective October 2001, the district developed internal service level agreements.
149	Implement an asset management application for the desktop support parts room. p. 575	Complete	(\$42,000)	\$0	\$0	By August 2002, the district had developed an asset management application for the desktop support parts room using existing resources. Rather than purchasing an inventory module for parts, the district found that the existing system would accommodate the inventory module with no additional purchases as part of the regularly scheduled operational upgrade. The inventory module was fully implemented in September 2002.
150	Report and track all technical support work through the Technical Assistance Center system. p. 576	Complete	\$0	\$0	\$0	As of October 2001, the district had conducted training for all departments that create, modify and search on the new AR Helpdesk System.
151	Train technical support supervisors to use the help desk system. p. 576	Complete	\$0	\$0	\$0	As of August 2001, the district had trained all Equipment Software Support Instruction personnel on the Remedy system.

152	Ensure that all students have equitable access to computers. p. 581	Complete	\$0	\$0	\$0	By July 2002, the district had formed a taskforce to determine an accurate student to computer ratio, developed a reporting mechanism to ensure better student access to computers and funneled district and donated computers to schools with higher ratios. Currently, the IT department is coordinating three Telecommunications Infrastructure Funds (TIF) grants and special projects that involve 159 schools. The district is using some of the TIF funds for teacher laptops.
153	Revise the district's Acceptable Use Policies for computers and networks based on best practice guidelines. p. 583	Complete	\$0	\$0	\$0	By June 2002, a district committee reviewed and revised the Acceptable Use Policy in local Board Policy CQ for computers and networks, which is displayed on every monitor upon login.
154	Require teachers to attend technology training to gain proficiency in using computer technology in the classroom. p. 586	Complete	\$0	\$0	\$0	The Instructional Technology staff has conveyed proficiency plans and expectations to campus teachers and technologists. After analyzing results from the preliminary audit and reviewing procedures in other Texas and North Carolina districts, staff have established benchmarks

						Teachers are required to pass the basic proficiency level to receive a laptop during the new curriculum resources roll-out. All information is posted on the district's web portal. Laptop distribution will occur over a 16-month process and be completed by June 2004.
155	Secure a contract for a disaster recovery services center. p. 589	Complete	(\$750,000)	\$0	(\$1,179,492)	The district established a disaster recovery services contract in August 2001.
	<b>Totals-Chapter 9</b>		<b>(\$2,719,570)</b>	<b>\$0</b>	<b>(\$2,546,892)</b>	
	<b>All Chapters</b>	<b>Grand Total</b>	<b>\$53,825,545</b>	<b>\$10,977,182</b>	<b>\$59,953,788</b>	

# Chapter 10: Student Transportation

Rec. #	Recommendations	Implementation Status	TSPR Projected Five -Year Savings (Costs)	DISD Savings (Costs) to Date	DISD Projected Five -Year Savings (Costs)	Comments
<b>Chapter 10: Student Transportation</b>						
156	Renegotiate intergovernmental agreement with Dallas County Schools for student transportation to include provisions for monitoring and controlling costs. p. 614	Complete	\$0	\$0	\$0	The district renegotiated its agreement with Dallas County Schools to include provisions for monitoring, controlling and reporting costs. The initial term of the agreement is one year beginning with 2002-03 (September 1, 2002 and continuing through August 31, 2003).
157	Require Dallas County Schools to implement automated routing and scheduling software. p. 616	Complete	\$1,989,430	\$0	\$1,405,190	Dallas County Schools will implement the Routing Software System at the beginning of 2002-03 (See Recommendations 129 and 156.)
158	Include standards for measuring the performance of Dallas County Schools in the intergovernmental agreement. p. 618	Complete	\$0	\$0	\$0	See Recommendation 156.
159	Confirm the inventory of school buses that are owned by DISD as a provision in the intergovernmental	Complete	\$0	\$0	\$0	See Recommendation 156.

	agreement with Dallas County Schools. p. 620					
160	Issue request for proposals for privatization of student transportation if an acceptable agreement cannot be negotiated with Dallas County Schools. p. 621	Complete	\$0	\$0	\$0	The district issued RFPs for the privatization of student transportation in January 2002 and conducted its feasibility study in October 2002 (See Recommendation 167).
161	Consolidate the Transportation Department with the Bus Transportation Division in the Service Center Department. p. 624	Complete	\$94,650	\$0	\$1,400,000	In July 2002, DISD outsourced its special needs and special education student transportation to Dallas County Schools and eliminated the Bus Transportation Department in the Service Center. Some key staff have been absorbed into the Transportation Department. The district estimates annual savings of \$350,000 per year in reduced salary and overtime pay.
162	Assign the responsibility and authority for contract oversight and project management for student transportation services provided by Dallas County Schools to a qualified DISD employee. p. 627	Complete	\$0	\$0	\$0	In May 2002, the executive manager of Support Services assumed responsibility for contract oversight and project management of student transportation services provided by Dallas County Schools.

163	Establish a mission statement for the Transportation Department that includes appropriate goals, objectives and performance measures. p. 628	Complete	\$0	\$0	\$0	In May 2002, the Transportation Department developed, reviewed and approved its mission statement.
164	Charge costs for tasks outside the scope of student transportation to user departments. p. 634	Complete	\$0	\$0	\$0	By August 2001, the Bus Transportation Supervisor had developed a tracking system to monitor the costs of providing non-transportation services and applying those costs to the appropriate user departments.
165	Use split shifts to control overtime worked by school bus drivers and supervisors. p. 635	Complete	\$643,041	\$0	\$571,590	The Bus Transportation Supervisor has reviewed the new split shift policy with all drivers. The Transportation Department will fully implement the policy in 2002-03. Going to split shifts dramatically reduced the need for overtime pay for drivers, saving the district \$114,318 per year, or \$571,590 over five years.
166	Reduce the spare bus ratio and adopt a bus replacement plan based on 15 years or 200,000 miles of service. p. 637	Complete	(\$255,000)	\$0	(\$255,000)	The Bus Transportation Department evaluated its fleet to determine a multi-year bus replacement policy based on 10 years or

						100,000 miles of service using data from the bus replacement schedule mentioned in Recommendation 138.
167	Conduct a feasibility study for outsourcing student transportation and develop a request for proposals. p. 640					The district has conducted a feasibility study for outsourcing student transportation. Initially, the district submitted RFPs for privatization, but later withdrew them when negotiations with Dallas County Schools proved productive. However, the district has submitted a new RFP, due October 2002, to compare the costs of outsourcing with Dallas County Schools to other vendors. The district will revisit outsourcing options in spring 2003.
	<b>Totals-Chapter 10</b>	Complete	\$0	\$0	\$0	
			<b>\$2,472,121</b>	<b>\$0</b>	<b>\$3,121,780</b>	
	<b>All Chapters</b>	<b>Grand Total</b>	<b>\$53,825,545</b>	<b>\$10,977,182</b>	<b>\$59,953,788</b>	

# Chapter 11: Food Services

Rec. #	Recommendations	Implementation Status	TSPR Projected Five - Year Savings (Costs)	DISD Savings (Costs) to Date	DISD Projected Five - Year Savings (Costs)	Comments
<b>Chapter 11: Food Services</b>						
168	Include Food Services management in key decisions affecting the department and clarify the authority of Food Services field specialists over the day-to-day operations of their assigned school kitchens. p. 650	Complete	\$0	\$0	\$0	In November 2001, the board changed policy, re-aligning the authority for school-based food service personnel. Cafeteria supervisors still report to principals.
169	Require monthly physical inventories at district kitchens and establish appropriate order quantities for the warehouse and kitchens. p. 651	Complete	\$0	\$0	\$0	In February 2002, Food Services began kitchen inventories.
170	Strengthen cash controls at district cafeterias. p. 655	Complete	\$0	\$0	\$0	By May 2002, Food Services had conducted training for cafeteria supervisors on cost-handling procedures.
171	Review the district's contract with its armored car service. p. 656	Complete	\$0	\$0	\$0	The district negotiated its armored car service contract in October 2002.
172	Evaluate alternatives for providing and transporting food services to the	Complete	\$0	\$0	\$0	By February 2002, Food Services had conducted a cost, time and



	eight satellite locations and conduct an audit of proper sanitation procedures. p. 658					temperature study and established audit procedures for food delivery to satellite locations.
173	Aggressively seek to identify all students eligible for free and reduced-price meals. p. 665					As a result of the change in the family application process completed at the schools, the district has increased the number of eligible students in the free and reduced-price meal program. DISD identified 4,300 eligible students (included in first year savings) from PEIMS edits. However, not all of those identified have completed an application. The district is now seeking state approval to put the eligibility application on its Web site and sent out flyers and advertising to qualify more students. The district's adjusted estimate of additional state compensatory funds is \$1,109,095 for the first year and \$1,663,360 for each of the subsequent years.
		Complete	\$12,386,710	\$1,109,095	\$7,762,535	
174	Use electronic	Complete	\$346,410	\$0	\$86,260	The district

	scanners to complete data entry for processing free and reduced-price meal applications. p. 666					researched other district scanning needs to find a compatible software. Currently, DISD is working with a software company to enhance usability of scanning software. In spring 2002, TEA and federal government staff visited the district to view an intelligence-scanning product. The software will cost the district \$50,000. The year prior to scanning, the district had already implemented a "Quick Entry" data program for inputting applications. Because of the reduction in labor, this had a major reduction in costs from previous years.
175	Increase student participation in the National School Lunch Program. p. 671	Complete	\$0	\$0	\$0	In July 2002, the district stopped vending and competitive sales during the lunch period, and it continues to explore other strategies for increasing participation in the lunch program.
176	Discontinue vending and concession	Complete	\$1,753,730	\$254,110	\$1,270,550	Per board policy, the general superintendent is

	operations during the lunch period. p. 674					responsible for the rules and regulations regarding the installation, use, control and removal of all vending machines within the district to ensure compliance with board policy, state purchasing laws and federal/state regulations. Specific policies now prohibit the placement of vending machines in any area on school premises where students are served or eat breakfast and lunch meals in any school. In addition, Food Services has restricted certain types of a la carte items sold in cafeteria lines. The savings achieved are from additional meals sold in the cafeteria.
177	Schedule lunches closer to normal meal hours and increase the number of lunch serving periods, where possible. p. 676	Complete	\$0	\$0	\$0	The district anticipates that new school construction, under the approved bond program, will relieve overcrowding and improve cafeteria accommodations, which will allow DUSD to

						schedule lunches at more reasonable times.
178	Increase student participation in the School Breakfast Program. p. 678					From October through December 2001, DISD middle and high school cafeterias had a special promotion called "Movie Madness." Each student who ate in the cafeteria received a raffle ticket for a weekly drawing for two free movie passes. As a result of the promotion, middle school breakfast participation increased 18 percent and high school participation increased 15 percent. Even after the promotion ended, more students were eating breakfast in the cafeteria. Overall, the annual middle school breakfast participation increased 12.6 percent, while high school participation increased 12.3 percent. Breakfast participation continues to increase.
		Complete	\$0	\$0	\$0	
179	Develop a food services facilities master plan in	Complete	\$0	\$0	\$0	In March 2002, the district included Food

	conjunction with the overall district facilities master planning effort. p. 680					Services input in the development of its facilities master plan for the 2002 bond program.
180	Reduce the time required for kitchen equipment repair and implement a preventive maintenance program. p. 682	Complete	\$0	\$0	\$0	Food Services now uses a database to manage and track repairs and equipment. The district is developing a plan to give Food Services full responsibility for commercial kitchen equipment repair, which will allow the department to direct its efforts to completing the repair quickly and reduce downtime.
	<b>Totals-Chapter 11</b>		<b>\$14,486,850</b>	<b>\$1,363,205</b>	<b>\$9,119,345</b>	
	<b>All Chapters</b>	<b>Grand Total</b>	<b>\$53,825,545</b>	<b>\$10,977,182</b>	<b>\$59,953,788</b>	

## Chapter 12: Safety and Security

Rec. #	Recommendations	Implementation Status	TSPR Projected Five - Year Savings (Costs)	DISD Savings (Costs) to Date	DISD Projected Five - Year Savings (Costs)	Comments
181	Consolidate safety and security functions under an associate superintendent for Safety, Security and Student Services. p. 692	Complete	\$0	\$0	\$0	The district believes that the safety and security functions needs to remain under the current designated deputy superintendent; however, all district communication and resources are coordinated and integrated through the Safety Council. The associate superintendent for Alternative Programs oversees all educational programs related to school safety and discipline management.
182	Develop and implement a districtwide School Safety and Security inspection program. p. 695	Complete	\$0	\$0	\$0	In 2001-02, the district developed a standard checklist to evaluate and report on the status of schools and facilities, developed an inspection schedule to visit all sites and conducted 34 inspections.
183	Design and implement a coordinated	Complete	\$0	\$0	(\$1,000,000)	In 2001-02, the district developed a system to track

	districtwide safety and security incident reporting system. p. 697					and report incidents, which has improved coordination of incident reporting as well as the evaluation and accuracy of reports. In 2002-03, the district will determine if funds are available for the purchase of an upgraded software program to report incidents. This program will be used to collect data and assist with assessing incident rates by schools with assigned security staff. (See Recommendation 185.) The estimated cost of the automated system is \$1 million.
184	Develop a new classification and compensation structure for security officers. p. 700	In Progress	\$0	\$0	\$0	See Recommendation 66 for additional information.
185	Develop a system for deploying security officers based on measurable needs. p. 701	Complete	\$0	\$0	\$0	The district generates incident reports using data generated by the automatic tracking system (see Recommendation 183). These reports assisted the district in defining criteria to allocate officer assignments for 2002-03.
186	Strengthen the use	Complete	\$0	\$0	\$0	In 2002 the

	of contract security services through a renegotiation of existing contracts and more rigorous contract management. p. 703					district consolidated all departments under one contract service provider for unarmed security services for its satellite facilities. Additionally, the Dallas Police Department contract was renegotiated to facilitate and enhance the ability of the district to better manage its contract. Currently, the board is considering an inhouse police force.
187	Evaluate whether DISD should continue to maintain its current Dispatch Center. p. 704	Complete	\$0	\$0	\$0	DISD found that an alarm monitoring system and a dispatch center would be a duplication of effort. Auxillary Services has completed a cost analysis of an external alarm monitoring system, and the department continues to work with Technology Services on alarm upgrades. The district is negotiating with the City of Dallas for emergency radio communication services, but has determined that it needs to maintain a central dispatch



						capability.
188	Ensure that district security employees are properly equipped. p. 706	Complete	(\$266,000)	\$0	\$0	The district has used existing resources for new and replacement equipment for uniformed campus personnel. The board has approved a vehicle replacement program, with nine vehicles replaced. All certified officers have received new uniforms and flashlights (see Recommendations 138 and 193 for related issues).
189	Modify the district's Student Code of Conduct to align the student disciplinary offenses with the consequences. p. 711	Complete	\$0	\$0	\$0	In summer 2001, a survey was distributed to principals regarding changes to the Student Code of Conduct. A committee of students, parents, teachers, principals and administrators reviewed the proposed changes. The final recommendations were approved by the general superintendent and the board in June 2001. The revised rules now ensure that the student disciplinary offenses match the consequences.
190	Develop a comprehensive long-range plan for the district's	Complete	\$0	\$0	\$0	By June 2002, the district had hired a consultant to review its existing

	alternative education programs. p. 713					alternative education programs. A new long-range plan was developed based on the findings of this review. The plan has assisted the district's efforts in addressing the needs of students with behavioral problems.
191	Improve the district's transition process for at-risk students. p. 714	Complete	\$0	\$0	\$0	See Recommendation 189.
192	Renegotiate the Community Education Partners contract to reflect district interests regarding accountability standards, guaranteed enrollment and contract termination. p. 715	Complete	\$0	\$2,938,000	\$22,690,000	The board approved the renegotiated contract with the Community Education Partners (CEP) on August 28, 2001. The renegotiation of the contract saved the district \$2 million annually. Additional annual savings of \$2,938,000 were achieved when the board voted to cancel the contract with CEP in June 2002. (\$2,938,000 x 5 years and \$2,000,000 x 4 years = \$22,690,000).
193	Develop, finance and implement a phased plan for installing required life safety systems and other preventive measures at all district facilities. n.	In Progress	(\$167,200)	\$0	\$0	The district uses bond program money and existing resources to purchase and install life safety systems. In 2002, the district purchased 40

	718					<p>metal detectors with plans to purchase 40 on an annual basis.</p> <p>Facilities Management will continue to monitor and update the metal detector replacement list based upon condition, age and repair cost of equipment.</p> <p>Equipment meeting the replacement criteria will be replaced, with replacements proposed in the annual budget.</p> <p>Facilities Planning will continue to work in conjunction with the City of Dallas Fire Department to ensure compliance with all current fire codes.</p>
	<b>Totals-Chapter 12</b>		<b>(\$433,200)</b>	<b>\$2,938,000</b>	<b>\$21,690,000</b>	
	<b>All Chapters</b>	<b>Grand Total</b>	<b>\$53,825,545</b>	<b>\$10,977,182</b>	<b>\$59,953,788</b>	