

Letter of Transmittal

December 16, 1999

The Honorable George W. Bush
The Honorable Rick Perry
The Honorable James E. "Pete" Laney
Members of the 76th Legislature
Commissioner James E. Nelson

Ladies and Gentlemen:

I am pleased to present this one-year report on the progress of the Socorro Independent School District (SISD) toward implementing the Texas School Performance Review (TSPR) recommendations.

In March 1998, TSPR released the results of a five-month study of the district's operations that included 115 recommendations that could save SISD nearly \$6.3 million over five years. The review was unique because SISD is one of the few districts in Texas providing year-round educational programs to its entire student body. In addition, Socorro is one of the state's poorest and fastest-growing school districts; however, its students are among the state's best by many academic measures.

In June 1999, TSPR returned to the district to determine how the district's leadership was putting our proposals into practice, and after another six months, we are ready to release the progress report. We found that SISD was moving forward, but the district requested additional time and assistance to fully understand the recommendations and take action. Today, the district has implemented, or is in the process of implementing, 107, or 93 percent, of TSPR's recommendations and saving taxpayers more than \$387,000. By 2002-03, SISD expects to realize savings of nearly \$6 million over five years.

This is good news, and SISD is to be congratulated. But, while work has begun, the work that remains to be done in the areas of facilities, strategic planning and district accountability will be critical to sustaining the district's progress. We are confident that SISD is up to this challenge and will carry forward with the commendable progress it has made to date.

Sincerely,

Carole Keeton Rylander

Carole Keeton Rylander Comptroller of Public Accounts

Introduction

In spring 1998, the Comptroller's office released a performance review of the Socorro Independent School District (SISD) as part of a nationally recognized program created by Texas lawmakers in 1991 to identify savings and improve operational efficiency in Texas public school districts. The Texas School Performance Review (TSPR) returned to SISD in summer 1999 to conduct a one-year progress report. This introduction describes recent changes in the TSPR process.

Improving the Texas School Performance Review

Comptroller Carole Keeton Rylander, 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 to the state's school districts. Having worked as a teacher and later as a school board president, the Comptroller has vowed to make TSPR more accountable to local school districts and the communities they represent.

Comptroller Rylander began by establishing new criteria for selecting school districts for future reviews. Priority will be given to districts that are performing poorly, either academically or financially, and to reviews that benefit the greatest number of students. *These are the school districts and children that need help the most.*

Recognizing that fewer than 52 cents of every state education dollar is spent on instruction, Comptroller Rylander emphasizes an approach that will give local school officials the ability to move every possible dollar to the classroom. In addition, school districts' best practices and exemplary models will no longer be left buried inside individual TSPR reports. Instead, Comptroller Rylander has ordered best practices and exemplary programs to be shared quickly and systematically among all the state's school districts, and with anyone who requests such information. There simply is no reason for a district that has solved a problem neatly to keep the solution to itself. Comptroller Rylander has directed TSPR to serve as an active clearinghouse of the best and brightest ideas in Texas public education.

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

- ensure that students and teachers receive the support and resources needed to succeed;
- identify innovative options for addressing core management challenges facing the district;
- ensure that administrative activities are performed efficiently, without duplication, and in a manner that aids education;
- develop strategies for ensuring the continual assessment and improvement of processes and programs;
- understand the links among district 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 Comptroller's "Yellow Pages Test" by determining if better, cheaper goods or services can be obtained from private sources in a way that benefits students and taxpayers alike.

Finally, Comptroller Rylander has opened her door to Texans who share her optimism about TSPR's potential. Suggestions to improve school reviews are welcome at any time. The Comptroller recognizes that public schools deserve all the attention, and assistance, they possibly can get.

Detailed information can be obtained from TSPR by calling, toll-free: 1-800-531-5441, extension 5-3676, or on the Comptroller's website (www.window.state.tx.us).

TSPR in Socorro

TSPR began its review of the Socorro Independent School District in October 1997. As in previous reviews, TSPR came to El Paso in response to a local call for assistance. In February 1997, only days after assuming his position, SISD Superintendent Don Schulte joined Senator Eliot Shapleigh in requesting a review of the district. In his letter, Mr. Schulte expressed pride in the district's accomplishments, but asked the Comptroller for suggestions that could make a good district even better.

With the help of Gibson Consulting (formerly Neal & Gibson), an Austin-based consulting firm, the TSPR team held public forums at two district high schools. To obtain additional comments, the review team interviewed district employees, school board members, students, parents, business leaders, and representatives from community organizations. In addition, the team collected comments from letters to the Comptroller's office and calls to the Comptroller's toll-free 1-800-531-5441 hotline.

The team also conducted focus-group sessions and personal interviews that yielded valuable comments from current and former district employees, parents, community leaders and students. Written surveys were sent to all administrators, one-third of all teachers, 480 parents and 250 students. TSPR received responses from 162 teachers and administrators, 34 parents representing 13 of the district's campuses, and 237 students. A number of one-on-one interviews helped the review team fine-tune its findings and recommendations.

The review team targeted 12 areas:

- District organization and management
- Educational service delivery and student performance
- Community involvement
- Personnel management
- Facilities use and management
- Financial management
- Asset and risk management
- Purchasing and distribution
- Computer technology
- Food services
- Transportation
- Safety and security

TSPR found that SISD is one of Texas' fastest-growing school districts, having doubled in size over the last 10 years, and also one of the poorest, ranking 852nd out of 1,037 Texas school districts in property wealth per pupil. More than 70 percent of the nearly 22,000 students are economically disadvantaged; 89 percent are Hispanic, 9 percent are Anglo, and 2 percent are members of other minorities.

While many districts cite large numbers of minority and economically disadvantaged students as reasons for declining student performance, SISD assumes that all students can succeed. In 1997-98, the Texas Education Agency (TEA) rated one SISD campus as "exemplary," eight as "recognized," and 13 as acceptable, with no campuses rated "low-performing."

SISD has an annual operating budget of \$114 million; a staff of 2,800 teachers, administrators, and support workers; and 23 school campuses and three support facilities containing nearly 3 million square feet of floor space on 322 acres of land.

Overall, we found a well-managed district with a laudable level of parent and community involvement, consistent increases in student performance, and cutting-edge technology. These successes have occurred despite rapid

growth, which has caused the district to hire constantly and build new schools almost annually.

As with every district reviewed by TSPR, the review team found opportunities to improve SISD. In the area of district management, the organizational structure was lean at the top, but overstaffed at the departmental level in several areas. The board lacked an internal audit function to address internal control and compliance issues. District procedures were documented inadequately, which inhibited SISD's ability to improve its processes and assess its automation requirements. Academic programs at the district faced three significant challenges: the rapid inadequate evaluation mechanisms for special educational programs; and SISD's lack of long-term strategic planning for instructional services. Other themes of TSPR's report included SISD's need to automate several processes and operations; strengthen its planning and forecasting processes; and improve its methods of tracking and monitoring performance.

Now we have returned to check on SISD's progress toward the goals outlined in our original report. During the initial follow-up visit in June 1999, TSPR found that progress was ongoing, but district administration had questions and concerns. SISD has suffered some setbacks to full implementation of TSPR's proposals, including the brief absence of the district's superintendent. Today, twenty-one months after the Comptroller's original March 1998 review, work has begun on TSPR's recommendations.

Beginning on July 17, 1998, the superintendent launched a massive three-step restructuring of the district. The goals of the restructuring were "further flattening the organization to enable a strengthening of the district's decentralized decision-making philosophy, while fostering increased communication between the superintendent and the campuses; slightly reducing administrative overhead costs; and building vertical teaming, as opposed to an emphasis on grade level support."

The first step consisted of changing the reporting line of the principals from the assistant superintendent for Instruction directly to the superintendent; laterally reassigning two Instruction Department directors to the Superintendent's Office to serve as campus liaisons; and filling the vacant assistant superintendent's position in the Personnel Services Department through a lateral transfer. The district also folded much of the Department of Instruction into the Department of Strategic Planning, with a new department title-- Department of Instructional Services--a change made to emphasize the district's service-oriented philosophy. The second step required each department to conduct its own review and make recommendations for internal restructuring. The final step resulted in a

recommendation to the board to add an internal auditor position, as recommended by TSPR. All three steps of the restructuring were complete by September 1998.

It's important to note that the district has begun many initiatives in the last few months that will take time to complete. In addition, several district operations face challenges that require more attention than others. Nevertheless, TSPR urges SISD to take time for the necessary planning and reflection to prevent future difficulties and ensure that this well-run district continues its tradition of success.

Summary of Savings and Report Card

Summary of Savings

	TSPR's Projected Savings	Total Savings Projected by TSPR	SISD's Actual and Projected Savings	Difference
1998-1999	Initial Annual Net Savings	\$1,055,791	\$387,108	(\$668,683)
TOTAL SAVINGS PROJECTED FOR 1998-2003		\$6,334,499	\$5,796,320	(\$538,179)

Socorro ISD Report Card

Chapter	Total	Complete	In Progress	Not Implemented	Rejected	Percent Complete/In Progress	Grades
District Organization and Management	8	5	3	0	0	62.5%/37.5%	Satisfactory
Educational Service Delivery and Student Performance	13	11	2	0	0	84.6%/15.4%	Excellent
Community Involvement	4	3	0	1	0	75%/0%	Needs Work
Personnel Management	12	8	3	0	1	66.7%/25%	Satisfactory
Facilities Use and Management	11	5	5	1	0	45.5%/45.5%	Satisfactory
Financial Management	9	3	4	2	0	33.3%/44.4%	Needs Work
Asset and Risk Management	5	2	3	0	0	40%/60%	Satisfactory
Purchasing and Distribution	7	6	1	0	0	85.7%/14.3%	Excellent
Computers and Technology	11	6	4	0	1	54.5%/36.4%	Satisfactory
Food Services	11	4	6	1	0	36.4%/54.5%	Satisfactory
Transportation	16	9	6	1	0	56.3%/37.5%	Satisfactory
Safety and Security	8	7	1	0	0	87.5%/12.5%	Excellent
Overall Grade	115	69	38	6	2	60%/33%	Satisfactory

Excellent = More than 80% complete

Satisfactory = 80% to 100% complete or in progress

Needs Work = Less than 80% complete or in progress

Exemplary Programs and Practices

TSPR's review highlighted numerous exemplary programs and practices in SISD. These programs and services are presented below, with updates on how SISD has enhanced them even further. The Comptroller encourages other school districts throughout Texas to examine them and determine whether they can be adapted to meet local needs.

- SISD is a stable district that enjoys the support of the community, local businesses, and parents. A sense of camaraderie and purpose makes SISD a highly desirable employer among area teachers, administrators, and other professionals.

SISD continues to grow in size. In addition to teachers, support personnel such as aides, bus drivers, cafeteria workers, office personnel and others are needed to support the district's educational focus. To ensure that SISD continues to attract the brightest and best, the board provides salaries and hourly wages comparable or slightly above those paid by other districts in the area. The board maintains this competitive salary schedule through continued studies by the Human Resources Department as well as outside agents. In addition, the board has a mechanism in place whereby employees may challenge their salaries.

- SISD is one of only a handful of Texas school districts that has successfully implemented a year-round education (YRE) program. Under YRE, the standard 175-day instructional year is broken up by shorter vacation periods spaced throughout the year, rather than a traditional summer break. YRE maintains continuous learning programs for students; the multi-track YRE used in some SISD schools, in which some students are in school while others are on vacation, allows for more efficient use of limited classroom space.

SISD continues to use YRE as a tool for getting the most out of its school buildings. Elfida P. Chavez Elementary is an example of the effective use of a multi-track YRE to accommodate student enrollment growth. Chavez Elementary opened during the 1997-98 school year with a student population of 850 students. During the 1998-99 school year, enrollment at Chavez rose to 1,250 students, at a time when two tracks were available to accommodate students. With the continued construction of new houses in the Chavez attendance area, SISD found it necessary to increase the number of tracks from two to four for the 1999-2000 school year, which allows the school to serve 1,550 students.

- While 61 school districts in Texas provide some form of YRE, only two districts, Brownsville and Socorro, provide multi-track programs. Brownsville does not, however, provide YRE districtwide. According to a spokesperson from the Texas Education Agency, Socorro's YRE program is a flagship in Texas as it has been in operation longer with more success and less controversy than any other district's. The success of the program is due primarily to an exhaustive planning effort that incorporated input from the entire community.

Throughout the years, the number of tracks at the various schools have changed. It has dropped to a single track in areas where the population has remained static. Some schools where the population is continuing to grow have two tracks; several high-growth areas have had to increase the number of tracks to three or four. Whether students are served in a single or multi-track, SISD has kept its primary focus on education.

- As already noted, SISD's student performance is very good, with two exemplary campuses, three recognized schools, and 15 schools rated acceptable during the last school year, as measured by test scores on the mandatory Texas Assessment of Academic Skills (TAAS); no SISD schools were rated as low-performing. In addition, SISD has increased its passing rate every year since 1993.

Student performance continues to be a source of pride for the district. In 1998-99, for the first time, SISD was named a Recognized School District by TEA for its student's achievement. The district had one exemplary school; nine recognized schools; 13 acceptable campuses, including the alternative education campus; and no low-performing campuses. SISD is the only district out of eight in El Paso County to receive a recognized rating in 1998-99.

- SISD's instructional technology is a special strength of the district. SISD has made significant investments in technology since the early 1990s, and today, the district's students and staff members have more than 12,000 e-mail accounts and access the Internet more than 72,000 times each day. The district offers about one computer for every 10 students, a ratio exceeding both the national average of 12 to one and the Texas average of 10.2 to one.

A year and a half after the initial report, SISD remains a leader in instructional technology. The district's students and staff members now have more than 28,000 e-mail accounts and access the Internet more than 300,000 times each day. The district provides

about one computer for every five students, a ratio greatly exceeding both the national and Texas averages.

- SISD's "Dream Machine," a mobile classroom funded by federal Title I grants, houses a library, two computer workstations, a television with VCR, a craft area, and a reading area. The Dream Machine travels throughout the district allowing community members to check out books, use computers and participate in activities designed to make young environment and help them get ready to start school.

Additional functions and activities provided by the "Dream Machine" include tutorial and remedial services to all school-aged children during inter-session periods.

- SISD's Special Education programs feature excellent, systematic pre-referral strategies that minimize referrals to special education, as well as several programs designed to increase the inclusion of special education students in regular educational settings. The district's "Class Within A Class" model is a teaching arrangement in which students with similar disabilities are placed in the same general education classroom and co-taught by regular and special education teachers.

In addition to regular in-service training on pre-referral strategies and procedures, when SISD teachers have questions about how to work with students, they are encouraged to visit other teachers' classrooms and observe effective teaching techniques. Instructional specialists also are available to demonstrate appropriate instructional strategies for teachers.

- SISD has numerous innovative and successful programs designed to prepare students for employment and higher education. For example, its Health Professions Academy is a four-year, in-school magnet program that was selected by the U.S. Department of Education as one of the nation's most innovative programs in 1994. The Naval Junior Reserve Officers Training Corps builds leadership and citizenship in participating cadets. Another example is Socorro High School's Media Production classes, which develop communication skills and give students hands-on experience with broadcast quality equipment.

SISD added the Academy of Careers in Education at Socorro High School in 1998-99 and a Career Academy for Teachers at Americas High School for the 1999-2000 school year. Both programs prepare students for a career in education. Two other

programs designed to prepare students for technology-related occupations immediately upon graduation from high school are offered at Americas High School and technical program at Montwood High School. Graduates can often earn a \$40,000 per year entry-level salary.

- SISD took advantage of the state's Instructional Facility Allotment (IFA) program, which allows the state to pay portions of the debt service used to build qualified school facilities, and received \$1.3 million from the program for the 1998-99 school year.

The district continues to take advantage of programs that provide additional revenues for facilities. For the 1999-2000 school year, the district received \$1.1 million from the IFA program to pay for bond interest and principal. This program paid for 70 percent of the district's bond service in 1998-99 and will pay for 75 percent in 1999-2000.

TSPR Key Recommendations

Even in the best-run public school districts, TSPR has never failed to find room for improvement. SISD was no exception. Much of the district's leadership is committed to positive change, a fact that is underscored by the fact that 93 percent of TSPR's recommendations already have been implemented or are in progress.

Following are some of the key recommendations identified by administrators and staff members as having the greatest effect on the district's overall operations. The highlighted recommendations are arranged by chapter and area of operation as contained in TSPR's original report. The comments come from the district's administrators.

District Organization and Management

- 1. Reclassify managerial positions to reflect consistent level of responsibility.**

The district expanded this recommendation to include all positions within the district. SISD hired a professor from the University of Northern Illinois, a noted expert in job classifications, to assist them in developing a comprehensive job classification system. The new classification system will help the district attract and retain the brightest and best teachers and administrators, while bringing greater equity to the system.

- 4. Develop a long-range strategic plan and coordinate all planning efforts through the assistant superintendent for Strategic Planning.**

The district stated this recommendation rose above the rest because it will eventually benefit the entire school system. The planning process will provide focus and a mechanism to set district priorities. Effective implementation plans also will guide budget preparation and help campuses and administrative functions better understand their role in the educational process.

- 7. Centralize control of policy manual updates in the Superintendent's Office and set up a system to ensure that updates are made in a timely fashion.**

The district not only centralized updates but placed the policies on its internal website, allowing faster distribution of policy information and greater

accessibility by staff to policy information. Policy changes now are available to all employees immediately upon initial distribution.

Educational Service Delivery and Student Performance

18. Streamline the identification procedure for the SISD gifted and talented program.

When TSPR first visited the district, controversy surrounded admission to the gifted and talented program. Some children were being placed in programs that did not meet their needs. By streamlining the process and better defining its criteria, by using a structured, two-step assessment process, students are being identified and served in programs that more directly meet their needs.

21. Upgrade the alternative program to better meet the needs of its students.

At the time of the initial review, SISD's alternative program was in disarray. Passing rates at KEYS Academy were significantly lower than alternative programs at a neighboring district; the curriculum was academically and technically less demanding than the mainstream district curriculum; the safety and security of staff and students was at risk because bus routes for KEYS students went through rival gang territories; and discipline was lax.

The campus discipline program was revised using Glaser's Quality School concepts and the Johnson Institute's Respect and Protect program. The district felt consistent discipline was a key to success in the alternative program. Good student conduct earns points towards release; students displaying bad conduct receive tickets that then result in fines or community service.

Community Involvement

25. Institute a system that ensures that all areas of the community have adequate opportunities to voice concerns and opinions about district activities and policies.

In April and May 1998, the Communications Department arranged a series of public meetings throughout the district to gather community input. The Board of Trustees then began periodically holding meetings at local schools. One trustee

even began holding open meetings he called "afternoon teas" at the schools, at 6 p.m., to discuss issues important to the community. All of these initiatives resulted in the district receiving more input from the community.

26. Develop policies and procedures to expedite the processing of Personal Action Forms.

The district took immediate steps to reduce the time required to process Personal Action Forms. Processing now takes, on average, four business days, a 375 percent reduction in the time required at the time of the initial review. The district eliminated a bottleneck by delegating signature responsibilities to three directors. The Human Resources Department has had favorable comments about this change from campuses across the district.

30. Track time accrued by Fair Labor Standards Act nonexempt employees at the district level to ensure that U.S. Department of Labor regulations are followed.

The district installed time clocks in 1999 to help supervisors more effectively track the time of nonexempt employees. The district conducted Fair Labor Standards Act training in December 1998 and June 1999, as well as training on the proper use and maintenance of time clocks. Bringing the district into compliance with federal regulations was important, but having better control over nonexempt employees' time will improve management and operations in all support areas.

36. Create a set of required training topics for all district employees.

The district developed and taught mandatory training for employees on Safety, FLSA, How to Create Proper Documentation, Sexual Harassment, and Technology 101. This training has helped district employees to hear and understand the expectations of the administration and more uniformly comply with those expectations.

Facilities Use and Management

38. Develop a long-range facilities master plan and facilities planning process.

SISD hired Texas Association of School Boards consultants to assist the district in developing a long-range master plan and facilities planning process. This is critically important because of the district's fast growth.

40. Develop a design development and construction standards handbook using life-cycle costing analysis.

SISD is in the process of producing a handbook, using Alief ISD's design development and construction standards handbook as a prototype. A consultant is assisting with this effort. This will help ensure that the design of new schools and additions are efficient.

42. Develop an Americans with Disabilities Act (ADA) compliance plan.

To ensure that its planning and construction projects are based on anticipated needs, the district retained a consultant to assess its current facilities and develop a facilities master plan. The development and implementation of an ADA plan will be undertaken as part of the facilities master plan.

Financial Management

49. Require the Finance Department to perform a complete fiscal feasibility analysis for every project or financial decision requiring board approval.

While mid-year changes in administrative personnel delayed implementation of this recommendation, the new director has begun conducting fiscal feasibility analyses. This is particularly important because it allows the district to see the costs and benefits of proposed major projects and gives the board sufficient information to evaluate the risks and make an informed decision.

53. Ensure that all original signed checks are mailed and delivered by someone outside the department originating the check.

A number of internal control weaknesses left SISD at risk. Payroll and Accounts Payable departments' checks now are distributed by the Operational Services receptionist. This change will prevent employees from being able to issue and mail a check to themselves.

57. Create a full-time position in the Division of Strategic Planning to oversee grant writing.

Oversight responsibility of grant writing was assigned to the director of Research and Analysis, while a job description for the position was considered by the board for approval. The district also subscribed to three grant alert periodicals and services to screen and disseminate opportunities to potential applicants (campuses, departments, or individuals) at least twice a week. Upon approval of the position by the board, it will be posted and filled.

Asset and Risk Management

59. Perform cash forecasting on a daily and monthly basis and sweep more money into higher-yield investments.

The district implemented procedures to forecast daily and monthly cash reserves, in what the district described as a significant change. As of January 1999, the district used daily and monthly forecast data to adjust for a potential cash shortage in August, averting a districtwide crisis that could have been an embarrassment at the end of the budget cycle.

Purchasing and Distribution

67. Purchase and install an automatic reorder point system and reduce warehouse and transportation inventory by establishing minimum and maximum inventory levels.

SISD implemented this recommendation immediately and while the district did not realize savings in the first year, it anticipates five-year savings approaching \$400,000.

Computers and Technology

74. Set performance targets for beginning and completing work requests and monitor response time against these targets.

District technology management stated this was the most important recommendation from their perspective because they are a service organization. Implementing performance standards for a wide variety of services performed by Information Technology (IT) staff is never easy. IT management drafted initial performance standards during summer 1998 and revised them based on an analysis of the data in July 1999. Now, any work order that is not resolved in five days is elevated in priority and assigned to the most senior technician for immediate resolution, netting a significant reduction from an average resolution time of 14 days.

Transportation

100. **Establish a regular bus procurement program to replace buses every 15 years, and retire the oldest buses in SISD's bus fleet.**

SISD has seriously considered the fact that its buses are aging and its routes need constant expansion to accommodate growth. The district presented a ten-year procurement plan to the board in October 1998 and is planning to buy a minimum of 38 buses during the 1999-2000 school year. A committee of district parents and personnel have begun meeting to identify budget requirements.

Safety and Security

110. **Comply with state law and district policies and procedures to ensure consistent application of discipline management practices.**

Conduct Violation Report, Law Enforcement Case Information and Interrogations and Searches forms to document necessary discipline information based on the Student Code of Conduct. Discipline occurrences are reported to the Safe and Drug Free Schools division at TEA and to the Department of Student Services in monthly Campus Discipline Reports. SISD now is in compliance with state law and district policies and procedures.

112. **Link the number of attendance officers to attendance rates at district schools.**

SISD, like all independent school districts in Texas, receives money from the state based on average daily attendance. The district added three new attendance officer

positions for the 1999-2000 school year. Improved attendance should result in about \$1.2 million in additional state funds over the next five years.

What Still Needs to Be Done

SISD has made progress, but if progress is to be sustained there are certain key issues that must be addressed. This section stops short of discussing each recommendation needing work, and concentrates on the broad topics or key issues that TSPR believes have the greatest potential for future improvement.

Facilities

One of the most important issues facing SISD is facilities use and management. While the district is making progress in this area by hiring consultants to assist with development of a long-range master plan and facilities planning process, construction standards handbook, and ADA compliance planning, much work remains to be done. SISD is one of the state's fastest-growing districts, and it is imperative that the district take steps, such as completing a long-range facilities master plan and design development and construction standards handbook, to meet the needs of its growing student population.

Planning

Strategic planning is another imperative for the district. The absence of a plan and a coordinated approach to planning has resulted in problems for the district in the past, such as the construction of additional schools that reached their maximum capacity immediately after opening. The board has approved a strategic planning process that the district will implement during the 1999-2000 school year. While the plan is a good starting point, SISD must follow up on this plan with processes for measuring progress toward goals and for reviewing and updating the plan annually. This planning and monitoring effort is critical to sustained progress in the district.

Financial Management

Accountability is yet another important issue. While the district developed new reports regarding employee mobility, annual employee attendance and new hires, transfers and resignations, the information contained in these reports still is not adequate for the board to evaluate SISD's efficiency. Financial and staffing reports containing per-unit data such as transportation costs per mile, number of employees per students served, long-term trend analysis of historical information and peer-district comparisons of key financial and efficiency data would facilitate the

board's understanding of the district's financial status, progress and productivity, and provide a foundation for improved district accountability.

A final issue is fiscal feasibility analyses for projects or decisions that require board approval. As discussed in the original report, feasibility studies to determine the costs and benefits of each major project should give the board sufficient information to evaluate risks and make informed decisions. While a new director of Finance has begun conducting fiscal feasibility analyses on all new projects, the procedure has not been institutionalized.

SISD's Ideas for Improving the TSPR Review Process

TSPR does not assume that its process for school district reviews cannot be improved. As in the districts TSPR reviews, there always will be elements of the review method itself that can be improved or carried out differently. As part of the progress report preparation, we ask districts what went right and what went wrong-and how we might do better.

SISD administrators and board members offered helpful suggestions to improve our future school district review. They commended TSPR on a professional, thorough and non-threatening report that prompted the district take a serious look at how it was operating and to make necessary improvements. They also commented that the process was a good collaboration between the state and the district.

In reviewing the reviewers, SISD administrators and board members offered a number of hints to help us improve our own work:

- District administrators pointed out instances in which TSPR missed essential information and consequently, developed recommendations based on an incomplete story. TSPR suggested that the district should conduct an energy audit to reduce costs at Montwood High, Helen Ball Elementary and Sierra Vista Elementary. Sierra Vista Elementary and Capt. Walter E. Clarke Middle schools are a single campus; however, the review team erroneously attributed all energy costs to Sierra Vista. Also, TSPR suggested that the district cooperatively purchase fuel and tires. At the time of the review, however, tires already were being purchased cooperatively through the state's General Services Commission. These facts were missed either during the findings meeting between the district and TSPR, at which the district has an opportunity to review and verify the facts and findings in the report, or were submitted after the meeting and inadvertently omitted from the final version. TSPR will attempt to reemphasize the importance of verifying the facts during its findings meetings and also will review its internal fact verification process for procedures that may be improved.
- SISD officials felt that TSPR underestimated the cost of implementing several recommendations. TSPR strives to provide conservative fiscal estimates but will continue to refine the process to ensure that both costs and savings estimates are as accurate as possible.
- District administrators did not think that the use of "industry standards" in some areas of the report were realistic for SISD. While industry standards are never completely transferable for any

district's operations, TSPR continues to believe they are valuable tools that districts can use as a basis for measuring their performance when peer data is not available.

- Because the public forums had such a small turnout, some district officials suggested that TSPR reconsider that particular method of gathering public input. The public forum, however, is only one method that TSPR uses to gather public input. Surveys, focus group sessions, and personal interviews also are used extensively. In some districts, the public is eager to attend public forums, while in others they are reluctant. Participation, unfortunately, cannot be determined in advance. Despite the lower turnout in SISD, it is imperative that we continue to give the public every opportunity to give us their uninhibited opinions about the district.
- District administrators would like to see a greater number of TSPR team members attend the meeting at which the district reads and verifies the findings in its report. They said this would make these meetings proceed more smoothly and rapidly. Under Comptroller Rylander, the TSPR team has been expanded, which may make it possible for larger teams to attend finding meetings in the future.
- Board members suggested that TSPR return to districts continuously every two to three years after the initial one-year progress report so that the report remains a living document. Several district administrators also felt that an earlier return to check on progress might have prompted the district to earlier action, citing the progress made between the June visit and the eventual release of this report as evidence. Comptroller Rylander recently authorized a return to Tyler for a three-year progress report of that district. How often and when TSPR visits districts after the initial progress report again will depend on available resources.

Appendix A - Status of Recommendations and Savings

Rec #	General Recommendation	Implementation Status	TSPR's Projected Five - Year Savings (Costs)	Actual Savings (Costs) To Date	SISD'S Projected Five - Year Savings (Costs)	Comments
CHAPTER 1: DISTRICT ORGANIZATION AND MANAGEMENT						
1	Reclassify managerial positions to reflect a consistent level of responsibility. (p. 31)	In Progress	\$0	(\$29,000)	(\$44,000)	SISD retained the services of a university professor, an expert in job reclassifications, to review all managerial positions and revise job descriptions to achieve the desired level of consistency. The district has reclassified a dozen positions to date. SISD and its consultant are 18 months into a two year project.
2	Conduct organizational staffing analyses annually to ensure appropriate staffing and management levels throughout the district. (p. 32)	Complete	\$0	\$0	\$0	The staffing committee formally meets with each principal and manager several times during the year to conduct organizational staffing analysis to ensure appropriate staffing and management levels throughout the

						district.
3	Update the site-based decision-making plan to provide schools with additional structure and guidance. (p. 34)	Complete	\$0	\$0	\$0	The Education Planning Advisory Committee (EPAC), the district Planning and Decision Making Committee, and the Board Instruction Committee updated and disseminated the site-based decision-making plan to campuses and district committees. The committees used the Texas Education Agency's Resource Guide for Integrated District and Campus Planning and Decision Making and district policies governing School Improvement Teams, as guides to develop the district and campus plans.
4	Develop a long-range strategic plan and coordinate all planning efforts through the assistant superintendent for Strategic Planning. (p. 37)	In Progress	\$0	\$0	\$0	The Texas Association of School Boards (TASB) briefed the board in fall 1998 regarding the essential elements of a strategic plan. The board approved a strategic

						planning process on June 17,1999, which will be implemented during the 1999-2000 school year.
5	Develop performance reports for the board to improve district accountability. (p. 39)	Complete	\$0	\$0	\$0	The board developed three new reports detailing employee mobility; yearly employee attendance; and new hires, transfers, and resignations. The board receives copies of the reports at periodic intervals.
6	Create an internal auditor position that reports directly to the board. (p. 42)	Complete	(\$213,260)	\$0	(\$268,170)	The position was created and filled on November 9, 1999. An audit plan is being developed.
7	Centralize control of policy manual updates in the Superintendent's Office and set up a system to ensure that updates are made in a timely fashion. (p. 44)	Complete	\$0	\$0	\$0	SISD developed Administrative Regulation BF, which addresses district procedures for policy updates. All policies are distributed districtwide and updated policies also are available via the Internet.
8	Develop documented operating procedures for all departments and ensure they are kept up to date. (p. 45)	In Progress	\$0	\$0	\$0	The district is formalizing existing operating procedures for the Personnel Services

45)					Department.
Totals -Chapter 1		(\$213,260)	(\$29,000)	(\$312,170)	

Appendix A - Status of Recommendations and Savings

Rec #	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	SISD'S Projected Five-Year Savings (Costs)	Comments
CHAPTER 2: EDUCATIONAL SERVICE DELIVERY AND STUDENT PERFORMANCE						
9	Focus district efforts on increasing all students' participation in advanced courses and college entrance testing. (p. 56)	Complete	\$0	\$0	\$0	The district offers a greater variety of Advanced Placement (AP) classes in all core areas including Social Studies and Science. SISD also expanded the number of teachers eligible to teach AP classes by enrolling them in and graduating them from a certified instruction program offered by UTDEI Paso.
10	Develop a plan to serve increasing enrollments effectively and efficiently while equalizing enrollment at schools. (p. 65)	Complete	\$0	\$0	\$0	With input from parents, teachers and administrators, a plan was developed for implementation during the 2000 school year. This plan takes effect in June 2000 with the opening of three new schools.
11	Create a specialist position in the	Complete	(\$267,380)	\$0	\$0	The district laterally

	Division of Strategic Planning to evaluate SISD programs. (p. 68)					transferred a director from another department to the position of director of Research and Analysis at no additional cost to the district.
12	Require each school in SISD to submit a written description and assessment of its Bilingual and ESL curricula. (p. 72)	Complete	\$0	\$0	\$0	The director of Bilingual Education provided teachers on each campus with revised curriculum and instruction guidelines, including instructions for written plans and assessments, for the district's Bilingual Immersion Program. The staff monitors teachers' use of state-adopted materials through classroom visits. The district also surveyed parents in English and Spanish about ways the district could better inform parents about the goals and objectives of bilingual education.
13	Require the director of Bilingual Education to set standards for the equitable expenditure of bilingual funds at each school. (p. 74)	Complete	\$0	\$0	\$0	The director of Bilingual Education now is in the expenditure approval loop. The director must approve the division's budget. Campus

						<p>administrators and teachers received a copy of Bilingual Education Allotment code and the director explained how the allotment could be spent. The director also made recommendations regarding what materials, supplies, and instructional kits principals should provide their teachers. However, site-based management precludes the director from requiring that any specific program and/or materials be purchased.</p>
14	<p>Provide additional training and support for teachers and administrators in the elementary and secondary schools with the highest rates of referral to special education. (p. 83)</p>	Complete	(\$13,000)	(\$1,000)	(\$1,000)	<p>In June 1998, SISD's administrators became part of the National Institute for Urban School Improvement and received \$2,000 for their campuses to use for professional development. The district also asked the Educators Professional Advisory Committee (EPAC) to include strategies in the district and campus plans to strengthen regular education</p>

						intervention activities for students who are not successful in the classroom.
15	Create a task force to develop a long-term strategic plan to decrease the share of special education students exempted from TAAS. (p. 87)	In Progress	\$0	\$0	\$0	To prepare for this the district appointed a task force to develop a long-term strategic plan during the 1999-2000 school year to decrease the number of special education students exempted from TAAS. State law has changed since the report was issued, altering certain exemptions. The task force should factor these changes into its plan.
16	Designate a parent-school liaison for special education and make this part of the employee's ongoing duties. (p. 88)	Complete	(\$25,000)	\$0	\$0	Due to budget restrictions, a stipend for a parent-school liaison for special education was not approved. However, the Instructional Specialists for Special Education have assumed the responsibility.
17	Redirect a portion of the district's compensatory education funds to the elementary schools for early intervention programs in reading and mathematics. (p. 95)	Complete	\$0	\$0	\$0	The district redirected funds from State Compensatory Education to reduce class size and used Title I and district funds to share costs with the Urban Systemic

						Initiative for the math program.
18	Streamline the identification procedure for the G/T program. (p. 106)	Complete	\$0	\$0	\$0	There is now a two-step process that gifted and talented campus coordinators follow when identifying students for the G/T Education program. If students do not meet the criteria under the first step, they are not administered the final qualifying criteria. Also, a committee was formed to set guidelines that will ensure consistency throughout the district during the screening process.
19	Develop a strategic plan to serve SISD's G/T students. (p. 108)	In Progress	\$0	\$0	\$0	The director provides G/T education certification incentives for all teachers. The district also adopted a new policy for the G/T program. The division is developing a 5-year plan for addressing the needs of the gifted and talented students.
20	Construct physical barriers to separate students attending KEYS Academy from administrative offices. (p. 110)	Complete	(\$3,600)	\$0	\$0	The campus discipline plan was revised based on William Glasser's Quality School concepts and the Johnson Institute's

						<p>Respect and Protect program. Consistent implementation has created a safer, more orderly campus. Students earn points to gain privileges at KEYS and toward exiting to their home schools. A School Resource Officer (SRO) was added to the staff. He issues tickets for disorderly conduct and/or arrests students and turns them over to the El Paso Juvenile Probation Department. Students who receive tickets appear before a magistrate. Group and individual mediation has been implemented. The uniform policy strictly is enforced. Students who cause disturbances on the bus are removed.</p>
21	Upgrade the alternative program to better meet the needs of students in that program. (p. 114)	Complete	\$0	\$0	\$0	<p>In addition to the efforts mentioned above, the curriculum for the alternative program is focused on improving student behavior first. All students</p>

						take a life skills class based on "Reconnecting Youth", approved by TEA for state elective credit. Class sizes are smaller and there is an instructional aide in each classroom, so students receive more individual attention.
Totals -Chapter 2			(\$308,980)	(\$1,000)	(\$1,000)	

Appendix A - Status of Recommendations and Savings

Rec #	General Recommendation	Implementation Status	TSPR's Projected Five - Year Savings (Costs)	Actual Savings (Costs) To Date	SISD'S Projected Five - Year Savings (Costs)	Comments
CHAPTER 3: COMMUNITY INVOLVEMENT						
22	Combine the Communications, Special Events and Partnerships, and Community Education departments into one director and three coordinators. (p. 128)	Not Implemented	\$276,432	\$0	\$0	While the district agreed with the original recommendation, the growth in the number of students being served in the district (an increase of 3,235 students from fall 1997 to fall 1999), led the district to conclude that these staff are necessary.
23	Include user training in query and report generation in the specifications for the new districtwide financial software. (p. 129)	Complete	\$0	\$0	\$0	A "train the trainer" requirement for Information Systems (IS) personnel was included in the software solicitation. IS developed customized training sessions for all users. Training on query and report generation began in June 1999 for "front line users" and will continue at a later date for administrators

						Grant managers, however, continue to use Quicken to track grants because of limitation in Pentamation, the new software system.
24	Expand SISD's use of radio as a method of communicating with the community. (p. 132)	Complete	\$0	\$0	\$0	The Communications Department trained members of the Public Relations Team to submit public service announcements to radio stations. The department also developed a radio station fax list that can be used when sending out media releases. The Communications Department also helped local radio stations secure qualified professionals from the district to be guests on local talk shows.
25	Institute a system that ensures that all areas of the community have adequate opportunities to voice concerns and opinions about district activities and policies. (p. 134)	Complete	\$0	\$0	\$0	The Communications Department has arranged public meetings throughout the district on numerous occasions. The board now periodically holds its meetings in local schools to facilitate the input from the community.

Totals -Chapter 3		\$276,432	\$0	\$0	
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Appendix A - Status of Recommendations and Savings

Rec #	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	SISD'S Projected Five-Year Savings (Costs)	Comments
CHAPTER 4: PERSONNEL MANAGEMENT						
26	Develop policies and procedures to expedite the processing of Personnel Action Forms. (p. 155)	Complete	\$0	\$0	\$0	Personnel Action Forms are being revised to include routing numbers and processing. Signature approval procedures are now delegated to Personnel Services directors to expedite the process. Turn-around time has been reduced 375 percent, to only four days.
27	Restructure the Human Resources Department by eliminating one director position, reclassifying the director of Records Management, and eliminating 0.5 employee records specialists. (p. 157)	Complete	\$539,400	\$0	\$0	The district did not eliminate staff, citing the growth in the number of students being served in the district (an increase of 3,235 students from fall 1997 to fall 1999). The Director-Records Management position was, however, moved to the Department of

						Operational Services and salary officers were reassigned to the Department of Business Services from Personnel Services to improve reporting relationships.
28	Streamline and automate the Human Resources Department's salary calculation and absence tracking processes. (p. 162)	In Progress	\$222,907	\$0	\$0	The salary officers and their responsibilities moved to Business Services to streamline the Human Resources Department but were not eliminated or reduced. The new software system will automate salary calculations. Absence tracking also will be faster and more automated with the purchase of new software for the Sub-Finder system. However, future enrollment growth is the reason cited by administrators for not reducing positions.
29	Develop and implement procedures to guide the content and security of district personnel records in	Complete	(\$1,000)	\$0	\$0	Training in file management has been completed and guidelines have been documented. Access to

	accordance with district policy. (p. 165)					personnel files is limited to key individuals in the Personnel Services Department. The records room is opened only when these key individuals are on duty.
30	Track time accrued by FLSA nonexempt employees at the district level to ensure that U.S. Department of Labor regulations are followed. (p. 167)	Complete	\$0	\$0	\$0	Time clocks have been installed and will enable supervisors to better monitor overtime. Federal Labor Standards Act (FLSA) training was conducted in December 1998. Training for supervisors on the use of time clocks was completed June 22. Time clocks will be in use beginning July 1, 1999. A copy of Administrative Regulation DEAD was distributed to all paraprofessional, auxiliary, and non-exempt employees.
31	Institute a combination across-the-board/performance pay plan for district employees. (p. 172)	In Progress	\$0	\$0	\$0	Several directors plan to visit school districts that have initiated performance pay plans, to determine how such a plan can be used in SISD.
32	Designate one senior assistant	Complete	(\$255,815)	\$0	\$0	In July 1998, the superintendent

	<p>principal at each multitrack school and make that individual acting principal during intersessions. (p. 173)</p>				<p>implemented a restructuring of duties and responsibilities by creating two director of Campus Services positions. The district's 23 campuses were aligned into three feeder patterns (elementary and middle schools that feed into a high school). The directors arrange and provide coverage for the principals and assistant principals so that they may attend staff development sessions and take personal time off from their school duties. Principals have stated that the assistance and support provided to them by the directors have allowed them to take non-duty days that they had been hesitant to take in previous years. Principals and assistant principals are carrying ever fewer non-duty days to the next school year, indicating that campus administrators</p>
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						are taking time off.
33	Institute districtwide procedures for the timely notification of vacancies throughout the district and aggressively seek to fill those vacancies. (p. 177)	In Progress	\$0	\$0	\$0	The district purchased a new computer system for all student and district business services. A program for position control will enable the Department of Personnel Services to maintain an accurate, up-to-date listing of all openings by the campus or department and will greatly facilitate the hiring of personnel.
34	Require all principals and supervisors to attend annual training in district hiring policies and procedures and in state and federal laws governing hiring. (p. 178)	Complete	\$0	\$0	\$0	SISD held training sessions on hiring policies and procedures and state and federal laws governing hiring in August and September 1999. The district plans to continue this training through an annual Fall Academy for principals and supervisors.
35	Delegate the decision on the number of in-district employees to interview for open administrative positions to the hiring committees. (p. 179)	Rejected	\$0	\$0	\$0	The district holds to its philosophy that all eligible employees should be interviewed for any open position. Both administration and staff believe

						that this practice is good for morale.
36	Implement a set of required training topics for all district employees. (p. 181)	Complete	\$0	\$0	\$0	Although decentralized decision making has made schools responsible for much of their own staff development, the district wrote an Administrative Regulation that mandates training on Safety, FLSA, Documentation, Sexual Harassment, and Technology.
37	Rewrite all administrative performance appraisal instruments to make them outcome-based and quantifiable. (p. 183)	Complete	\$0	\$0	\$0	In February 1999, the board approved Policy DNB: Performance Appraisal: Evaluation of Other Professional Employees, to reflect quantifiable data for administrative appraisals.
Totals -Chapter 4			\$505,492	\$0	\$0	

Appendix A - Status of Recommendations and Savings

Rec #	General Recommendation	Implementation Status	TSPR's Projected Five - Year Savings (Costs)	Actual Savings (Costs) To Date	SISD'S Projected Five - Year Savings (Costs)	Comments
CHAPTER 5: FACILITIES USE AND MANAGEMENT						
38	Develop a long-range facilities master plan and facilities planning process. (p. 192)	In Progress	(\$54,000)	\$0		
(\$4,500)	The district has contracted for consulting assistance for the development of a long-range master plan and facilities planning process through TASB.					
39	Permanently move the electric, plumbing, and energy management functions under the director of Support Services. (p. 194)	Complete	\$0	\$0	\$0	The district moved the electric, plumbing, and energy management functions under the director of Support Services.
40	Develop a design development and construction standards handbook using life-cycle-costing analysis. (p. 196)	In Progress	\$0	\$0	\$0	The district is in the process of producing a handbook modeled after the Alief ISD handbook.
41	Review and amend attendance zone boundaries. (p. 203)	Not Implemented	\$0	\$0	\$0	Although no action has been taken to date, the Assistant Superintendent for Administrative Services will re-define boundaries as required on an annual basis.
42	Develop an ADA compliance plan (p. 204)	In Progress	\$0	\$0	\$0	The development and implementation

	204)					of an ADA plan will be completed as part of the master plan being developed for the district's facilities.
43	Contract with a licensed inspector to complete a three-year update asbestos inspection as required by federal law. (p. 205)	Complete	(\$14,000)	(\$1,080)	(\$3,240)	A licensed inspector for asbestos has completed the required inspections and has submitted his report indicating that the district is in compliance with federal law.
44	The Purchasing Department should oversee the bidding and selection process for construction and renovation projects. (p. 209)	Complete	\$0	\$0	\$0	The Purchasing and Facilities Departments now work collaboratively on all construction projects and the Purchasing Department oversees the bidding and selection process for construction and renovation projects.
45	Develop a priority list of proposed capital improvements with cost estimates for each. (p. 210)	In Progress	\$0	\$0	\$0	Every year, a list of proposed capitol improvement projects, along with cost estimates, will be generated. The list then will be prioritized and acted upon on a continual basis.
46	Adapt the AIA architectural/engineering and construction contracts for future facility projects. (p. 211)	Complete	\$0	\$0	\$0	AIA documents/contracts are now being used for all architectural, engineering, and construction contracts.
47	Track preventive maintenance jobs through the existing work-order system. (p. 217)	Complete	\$0	\$0	\$0	Preventive maintenance jobs now are tracked through SISD's current work-order

						system.
48	Conduct an energy audit at Montwood High, Helen Ball Elementary, and Sierra Vista Elementary to reduce energy costs at these schools. (p. 223)	In Progress	\$0	\$0	\$0	An energy audit has been conducted, by an external HVAC-certified contractor hired by the district, on the three campuses identified. Measures have been undertaken to correct noted deficiencies, but savings could not be estimated.
Totals -Chapter 5			(\$68,000)	(\$1,080)	(\$7,740)	

Appendix A - Status of Recommendations and Savings

Rec #	General Recommendation	Implementation Status	TSPR's Projected Five - Year Savings (Costs)	Actual Savings (Costs) To Date	SISD'S Projected Five - Year Savings (Costs)	Comments
CHAPTER 6: FINANCIAL MANAGEMENT						
49	Require the Finance Department to perform a complete fiscal feasibility analysis for every project or financial decision requiring board approval. (p. 233)	In Progress	\$0	\$0	\$0	A mid-year change in administrative personnel delayed implementation, but work has now begun.
50	Reassign some of the accountant's duties to accounting clerks. (p. 234)	Complete	\$0	(\$7,453)	(\$82,000)	A new clerk recently has been hired. In July 1999, the new clerk assumed responsibilities for fixed assets and reconciling statements for Accounts Payable staff. The district spent \$620 advertising for the new position and expenditures to date include five-months of salary of an annual expenditure of \$16,400.
51	Implement procedures to improve controls over construction expenditures. (p. 236)	In Progress	\$0	\$0	\$0	Accountants now are responsible for reviewing construction bills for reasonableness and accuracy prior to payment.

52	Allow only Purchasing Department personnel to set up and amend vendor information and only Accounts Payable personnel to input payable information. (p. 237)	Complete	\$0	\$0	\$0	Access was re-defined through computer software security.
53	Ensure that all original signed checks are mailed and delivered by someone outside the department originating the check. (p. 239)	Complete	\$0	\$0	\$0	The Payroll Department now distributes Accounts Payable checks and the Accounts Payable Department distributes payroll checks.
54	Improve budget workshop packages to provide per-student and per-unit analysis as well as trends in financial performance and peer or benchmark data. (p. 244)	Not Implemented	\$0	\$0	\$0	This recommendation was Not Implemented this year, but the district intends to use comparative financial information from "Snapshots". As the budget is refined, "per-student" and "per-unit" analyses will be used.
55	Modify school allocation methods to ensure the equitable allocation of resources among all tracks and schools. (p. 245)	In Progress	\$0	\$0	\$0	The district is studying alternative allocation of resources from Ysleta ISD. The plan is very extensive and it will take a year to develop a comparable plan for SISD. The district retained the services of a consultant from YISD to assist it in this effort.
56	Allocate indirect	Not	\$0	\$0	\$0	During the 1999-

	costs to campuses and departments to make them aware of and accountable for total costs. (p. 246)	Implemented				2000 school year, SISD will evaluate equitable allocation of indirect cost and determine cost/benefits before implementation.
57	Create a full-time position in the Division of Strategic Planning to oversee grant writing. (p. 249)	In Progress	\$732,620	\$37,393	\$1,500,000	Oversight responsibility was assigned as an additional duty to director of Research & Analysis. The district subscribes to three grant alert periodicals/services. Opportunities are screened and passed on to potential applicants (campuses, departments, or individual staff) at a minimum of twice a week.
Totals -Chapter 6			\$732,620	\$29,940	\$1,418,000	

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Rec #	General Recommendation	Implementation Status	TSPR's Projected Five - Year Savings (Costs)	Actual Savings (Costs) To Date	SISD'S Projected Five - Year Savings (Costs)	Comments
CHAPTER 7: ASSET & RISK MANAGEMENT						
58	Explore the need for increased insurance coverage at the Aquatics Center, and put a comprehensive safety plan in place to reduce potential liability. (p. 259)	In Progress	\$0	\$0	\$0	The Operational Services Department is developing a safety plan and insurance has been reviewed.
59	Perform cash forecasting on a daily and monthly basis and sweep more money into higher-yield investments. (p. 263)	Complete	\$60,500	\$5,000	\$48,000	Procedures have been implemented to review cash activity on a daily basis.
60	Deposit checks on a daily basis to tighten financial controls. (p. 264)	Complete	\$0	\$0	\$0	Procedures have been written to tighten internal controls. Deposits are prepared daily.
61	Place a bar code on all fixed assets and replace the fixed-asset accountant with a fixed-asset clerk. (p. 270)	In Progress	\$77,000	\$0	\$0	A committee has been established to evaluate bar coding software that allows inventory clerks to match an

						inventoried item to a specific location or site within a district building. A current staff member will oversee the study.
62	Establish a board policy for the capitalization of fixed assets with a threshold of \$5,000 and maintain a separate controllable inventory listing of less-expensive items. (p. 271)	In Progress	\$0	\$0	\$0	On April 6, 1999, the board approved a policy for the capitalization of fixed assets with a threshold of \$5,000.
Totals -Chapter 7			\$137,500	\$5,000	\$48,000	

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Rec #	General Recommendation	Implementation Status	TSPR's Projected Five - Year Savings (Costs)	Actual Savings (Costs) To Date	SISD'S Projected Five -Year Savings (Costs)	Comments
CHAPTER 8: PURCHASING AND DISTRIBUTION						
63	Seek out and participate in opportunities to develop a regional or multi -regional cooperative purchasing program. (p. 283)	Complete	\$0	\$0	\$0	The board approved an inter-local agreement with the Texas Local Government Purchasing Cooperative. The district continues to use General Services Commission agreements. Also, a new food service cooperative has been formed in local ISD's.
64	Modify the request for proposals for the Pentamation replacement software to address problems in the purchase requisition and purchase order processes. (p. 284)	Complete	\$0	\$0	\$0	The new computer system provides for solutions to address the problems indicated in the performance review in areas of requisitions and purchase order processes.
65	Develop and use key performance measures to aid in managing operations. (p. 286)	Complete	\$0	\$0	\$0	The new system creates reports that address issues on financial performance, cycle time, and supplier quality.

66	Consolidate purchasing and distribution functions in one department and place the management of the Warehouse Department under one supervisor. (p. 290)	Complete	\$384,970	\$0	\$400,000	The Operational Services Division, on advice from the district's auditors, modified this recommendation. As a procedural safeguard, the same employee should not oversee both purchasing and distribution of goods. Procedures, however, have been streamlined for purchasing and distributing goods thereby accomplishing the spirit of the recommendation.
67	Purchase and install an automatic reorder point system and reduce warehouse and transportation inventory by establishing minimum and maximum inventory levels. (p. 296)	Complete	\$42,200	\$0	\$400,000	The warehouse's management system from Pentamation's Open Series software establishes, sets, and adjusts inventory reorder points. Although no savings have been achieved to date, district administrators believe that better inventory management will save up to \$400,000 over the next five years.
68	Place a bar code on all district textbooks for middle and high schools and install an automated data entry system for	In Progress	\$29,215	\$0	\$100,000	SISD is in the process of selecting the bar code system that will track all textbooks for middle and high

	textbook tracking in middle and high schools. (p. 302)					schools. The district is waiting for the new Pentamation System to become operational in order to evaluate which bar code system will interface better with the new financial software package.
69	Upgrade Print Shop machinery and equipment and reduce staff by automating operations. (p. 305)	Complete	\$40,580	\$10,250	\$160,225	The Print Shop staff has been reduced and the equipment was upgraded.
Totals -Chapter 8			\$496,965	\$10,250	\$1,060,225	

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Rec #	General Recommendation	Implementation Status	TSPR's Projected Five-Year Savings (Costs)	Actual Savings (Costs) To Date	SISD'S Projected Five-Year Savings (Costs)	Comments
CHAPTER 9: COMPUTERS AND TECHNOLOGY						
70	Develop a set of standard technology-related performance reports. (p. 317)	Complete	\$0	\$0	\$0	Performance reports have been developed for the Technical Systems Division as part of the implementation of the new help desk software. The reports are reviewed during regular staff meetings and analyzed periodically to optimize response time. The Administrative Applications Division shares weekly status reports internally, meets on a regular basis to facilitate communication.
71	Review technical salaries on an annual basis to ensure the district remains competitive. (p. 319)	Complete	\$0	\$0	\$0	In 1997, SISD compared its salaries to other school districts in Texas, the Southwest region, and across the nation. A TASB consultant

						reviewed the results of the study and recommended that MIS receive a salary adjustment.
72	Modify course offerings, market new course offerings, and adjust the training budget based on enrollment. (p. 324)	Complete	\$0	\$0	\$0	The new training program design began in August 1999.
73	Purchase more effective help desk/work request software and develop procedures to streamline help-desk activities. (p. 326)	Complete	(\$19,200)	(\$19,200)	(\$19,200)	Software has been selected and ordered. Hardware was installed in June 1999.
74	Set performance targets for beginning and completing work requests and monitor response time against these targets. (p. 3285)	Complete	\$0	\$0	\$0	Performance targets have been developed and were implemented beginning in July 1999. Each maintenance technician's work order assignment is tracked for response time and resolution. Any work order not resolved in five days time is elevated in priority and reassigned to a senior technician for immediate resolution.
75	Purchase a district license for virus protection software. (p. 330)	In Progress	(\$101,680)	\$0	\$0	The district's Technology Committee is evaluating virus protection

						software. A recommendation is anticipated by spring 2000.
76	Develop a disaster recovery plan that ensures that critical applications can be operated In the event of disaster. (p. 331)	In Progress	\$0	\$0	\$0	A disaster recovery plan is being developed. SISD anticipates that the completion date will be January 2000.
77	Refine the new technology plan to include cost estimates and measurable objectives in the new technology plan. (p. 337)	Complete	\$0	\$0	\$0	The technology plan revisions are complete. The plan was approved by the SISD board in March 1998 and by the Texas Education Agency in May 1998.
78	Perform process analyses and cost-benefit analyses to determine which requirements should be incorporated into the business system RFP. (p. 341)	Rejected	\$0	\$0	\$0	Process and cost-benefit analysis would have delayed the purchase of the new software system, making it difficult to achieve operational status by the year 2000 deadline. The new system does incorporate additional modules that when implemented will allow the district to become more efficient by providing position control, COGNOS report writer, and student inquiry screens. Any future purchases

						of customized changes will incorporate the recommendation. Hiring a consultant would have cost the district \$100,000.
79	Create one new position on the Instructional Technology team to act as an instructional technology facilitator. (p. 344)	In Progress	(\$154,375)	\$0	\$0	The District's Technology Committee recommends that three positions (Technology Mentors) be created due to the number of schools in SISD.
80	Reassign an individual at each school to act as a school technology coordinator and modify their job description, provide training, and provide a stipend for these individuals. (p. 345)	In Progress	(\$138,000)	\$0	\$0	The district's Technology Committee agrees that support at the campus level is necessary for SISD teachers to use the technology now available. However, the committee recommends that a technology mentor be assigned to each of SISD's three feeder patterns with the sole responsibility of providing support for teachers.
Totals -Chapter 9			(\$413,255)	(\$19,200)	(\$19,200)	

Appendix A - Status of Recommendations and Savings

Rec #	General Recommendation	Implementation Status	TSPR's Projected Five - Year Savings (Costs)	Actual Savings (Costs) To Date	SISD'S Projected Five - Year Savings (Costs)	Comments
CHAPTER 10: FOOD SERVICES						
81	Eliminate one field supervisor position. (p. 357)	Complete	\$109,500	\$25,000	\$125,000	The district eliminated one field supervisor position, saving \$25,000 in annual salary and benefits.
82	Document all Food Services policies and procedures and ensure that all Food Service employees and temporary workers sign a statement indicating that they have received copies of these documents. (p. 358)	In Progress	\$0	\$0	(\$785)	Policies and procedures for the Child Nutrition Services program are documented. The district is developing a user-friendlier model to distribute to employees. The district obtained a copy of the Cypress Fairbanks ISD Food Service Department policies and procedures manual to assist it in this endeavor. SISD hopes to have an employee manual ready for distribution by the end of the 1999-2000 school year.
83	Reduce	In	\$3,105,750	\$62,074	\$310,370	All necessary

	<p>departmental staffing by 391.7 hours each day to bring meal equivalents per labor hour into line with industry standards. (p. 361)</p>	<p>Progress</p>			<p>training has been provided to cafeteria managers to assist them in understanding the need to control labor costs. Every week, each campus operation must submit a status report showing its trays per staff hour, which will indicate actual revenues earned and labor costs. When a campus does not achieve its labor goal, the supervisors offer counseling to the manager of the facility. Trays per staff hour have remained constant. Due to the individualized demands on each campus, the district does not feel that staff hours can be reduced. However profitability has increased by four percent (\$62,074), which also results in a year-to-date profit of four percent (\$39,014). However, staffing reviews will be conducted annually to determine whether staff</p>
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						can be reduced.
84	Pre-certify families through the Texas Department of Human Services Food Stamps/Temporary Assistance for Needy Families program. (p. 363)	Complete	\$2,350	\$37,400	\$187,000	The district now pre-certifies students while continuing to send applications for free- and reduced-meals home with students. The district estimates that 200 additional students were added in the last year. The district recoups \$187 per student per year in federal funds.
85	When the processing of purchase orders and invoices is automated, eliminate the Food Services accounts payable clerk and include user training in query and report generation in the specifications for the replacement for Pentamation. (p. 367)	Not Implemented	\$67,200	\$0	\$0	The Child Nutrition Services accounts payable clerk continues to remain very busy reviewing invoices against bid information for accuracy and entering the invoices and purchase orders into the Pentamation system for approval and processing for payment. The district will continue to review this recommendation when it formally moves into the new accountability system. If it is discovered that this position can be eliminated

						the department will make the recommendation at that time. The department is processing an additional 2,052 invoices per year.
86	Purchase the SNAP nutritional analysis component. (p. 368)	In Progress	(\$20,000)	\$0	\$0	Food Services is evaluating its computer software. As part of the evaluation process, the department will evaluate the nutritional analysis component. In the meantime, the department continues to rely on the services of Region 19 for nutritional analysis of its menu plans developed by TEA to assure nutritionally sound meals are offered and served to students.
87	Include the maintenance of food services equipment in the Facilities Department's maintenance work order system. (p. 369)	Complete	\$0	\$0	\$0	All work orders are processed through the Facilities Department's maintenance work order system. All work orders received for food service equipment or other needed repairs are forwarded to Facilities for entry into the

						<p>maintenance work order system. The work orders then are dispatched to the appropriate department for service.</p>
88	<p>Implement strategies to increase student meal participation rates to 70 percent in elementary schools, 60 percent in middle schools, and 50 percent in high schools. (p. 373)</p>	<p>In Progress</p>	<p>\$544,565</p>	<p>\$314,324</p>	<p>\$1,581,620</p>	<p>Providing quality service is a primary goal for the Food Services Department. The department instituted what it calls the "Luby's Look" in many of the school cafeterias. Food Services increased choices and menu options, and periodically, runs promotions or special event days to encourage student participation. Food Services is encouraged by the increased numbers of students participating each day.</p>
89	<p>Issue student identification cards to all students and encourage the parents of students who pay for lunch to prepay meals via the card account. (p. 375)</p>	<p>Complete</p>	<p>\$0</p>	<p>\$0</p>	<p>\$0</p>	<p>Bar-coded meal cards or student identification cards are provided for all SISD students. Letters and memos are sent home periodically to parents encouraging them to make</p>

						pre-payments for meals or a la carte items. When the funds in a student's account runs low, reminder notices are sent home.
90	Negotiate an exclusive vendor contract for vending machines. (p. 376)	In Progress	\$100,000	\$0	\$500,000	The assistant superintendent for Operational Services and the director of Purchasing are in the process of developing an RFP for an exclusive vendor contract.
91	Move vending machines away from cafeterias, turn them off during lunch times, and replace high-sugar, high-fat items with nutritious food and beverages. (p. 379)	In Progress	\$0	\$0	\$0	The Food Services Department believes that the district policy "CO" addresses this topic. When schools are found to be in violation of policy, school administrators are contacted immediately. Copies of the policy and a listing of non-allowable foods have been provided to those campuses. Although some campuses continue to violate federal guidelines and are operating vending machines in competition with food services operations

						Food Services will continue to encourage all of the campuses to make wise choices when selecting food items for sale.
Totals-Chapter 10			\$3,909,365	\$438,798	\$2,703,205	

Appendix A - Status of Recommendations and Savings

Rec #	General Recommendation	Implementation Status	TSPR's Projected Five - Year Savings (Costs)	Actual Savings (Costs) To Date	SISD'S Projected Five - Year Savings (Costs)	Comments
CHAPTER 11: TRANSPORTATION						
92	Upgrade the coordinator of the Transportation Department to a director level position. (p. 390)	Complete	(\$22,955)	\$0	(\$25,000)	In May 1999, SISD submitted compensable positions and their descriptions to the board's Personnel Committee for consideration. The board approved the measure in November 1999.
93	Upgrade the Transportation Department's team leader, auto shop foreman, and secretary positions. (p. 392)	Complete	(\$142,500)	\$0	(\$45,000)	This recommendation also was submitted to the board's Personnel Committee for consideration. The board approved the recommendation in November 1999.
94	Reduce the number of permanent driver positions to match the peak driver requirement. (p. 393)	Not Implemented	\$131,500	\$0	\$0	Since the review, a reduction in the tracks for most schools has resulted in increased ridership , the opening of new campuses, and expectations of

						future openings. Thus, the current number of drivers is appropriate for peak hour needs.
95	Increase the number of substitute drivers, improve hiring and recruitment practices, and establish an attendance incentive program for drivers. (p. 395)	In Progress	(\$246,500)	(\$52,600)	(\$263,000)	The number of substitute drivers was held to five during the 1998-99 school year. Personnel Action Forms requesting four additional substitute drivers will be included in the 1999-2000 budget plans. Aggressive newspaper advertising yielded positive results in recruiting replacement drivers. Incentives are in place.
96	Promote the financial advantage of working a guaranteed 239 days each year to part-time drivers. (p. 397)	Complete	\$0	\$0	\$0	The coordinator briefs all new employees on advantages during orientation. When recruitment is underway, SISD advertises the benefits it offers.
97	Report all hazardous route service requests to the Board of Trustees and allow them to determine if a board resolution to TFA is	Complete	(\$8,200)	\$0	\$0	All hazardous routes for the 1999-2000 school year were approved by the board in October 1999.

	appropriate to increase state funding. (p. 401)					
98	Increase the fee for field trips to reflect the actual cost of providing the service; charge a premium fee for field trips that interfere with daily school routes. (p. 402)	Complete	\$0	\$0	\$50,000	An increased fee schedule for field trips will be implemented during the 1999-2000 school year.
99	Increase the charges to non-district organizations for field trips to fully recover the district's costs. (p. 403)	Complete	\$46,000	\$0	\$0	Differentiated rates are now in place.
100	Establish a regular bus procurement program to replace buses every 15 years, and retire the oldest buses in SISD's bus fleet. (p. 408)	Complete	(\$640,800)	\$0	(\$560,000)	The board approved a ten-year procurement plan in October 1999; the district is working on buying a minimum of 38 buses during the 1999-2000 school year.
101	Fully use Microsoft Nutshell as a vehicle maintenance information system. (p. 410)	In Progress	\$0	\$0	\$0	The district is developing specifications for fleet maintenance and is reviewing existing software programs to identify the most effective and efficient programs to purchase.
102	Relocate Transportation Center activities	Complete	(\$20,500)	\$0	\$0	Instead of relocating the function, the

	into the Support Services Complex to provide seven maintenance bays and appropriate offices. (p. 412)					district contracts for maintenance as needed and for fuel at a service station within one mile of the Student Activity Center.
103	Provide the minimum level of capital improvements needed to support bus operations at the SAC and reduce bus travel to the Transportation Center. (p. 414)	In Progress	\$541,600	\$0	\$0	The district took an alternative approach by making arrangements to provide maintenance where needed and fuel at a service station within one mile of the Student Activity Center. The district has not tracked the savings, although it states half of all buses now fuel at the service station, at a slightly lower price than fueling at the Transportation Center.
104	Coordinate with surrounding districts and approach the Region 19 Education Service Center to offer a monthly or bimonthly driver training course. (p. 417)	In Progress	\$0	\$0	\$0	Meetings with other districts and Region 19 have taken place. A recommendation to the executive director of Region 19 is forthcoming during the fall 1999.
105	Cooperatively purchase fuel and tires. (p. 418)	Complete	\$199,000	\$6,000	\$200,000	Fuel is being bought through competitive quotations on a bi-annual basis, resulting in savings to the

						district. Tires are being bought through the state bid, put out by the General Service Commission.
106	Develop key indicators to measure and monitor the performance of regular and special education transportation. (p. 420)	In Progress	\$350,000	\$0	\$350,000	Two service quality measures will be implemented during the 1999-2000 school year: a Route On-Time Survey (Random) and an Extracurricular Quality Service Survey.
107	Establish the Transportation Department as a separate internal service fund within the district. (p. 423)	In Progress	\$0	\$0	\$0	The Transportation and Finance Departments are coordinating the implementation policy, procedures, and parameters of establishing the Transportation Department as a separate internal service fund.
Totals -Chapter 11			\$203,045	(\$46,600)	(\$293,000)	

Appendix A - Status of Recommendations and Savings

Rec #	General Recommendation	Implementation Status	TSPR's Projected Five - Year Savings (Costs)	Actual Savings (Costs) To Date	SISD'S Projected Five - Year Savings (Costs)	Comments
CHAPTER 12: SAFETY AND SECURITY						
108	Develop a long-range plan and performance measures for the district's safety and security functions. (p. 432)	In Progress	\$0	\$0	\$0	SISD completed a long-range plan and is developing performance measures. Each student receives a copy of the SISD Student Code of Conduct at enrollment. PEIMS discipline reports and records the performance measures for the Student Service Department.
109	Coordinate the district's safety and security functions fully with other school districts and local agencies. (p. 436)	Complete	\$0	\$0	\$0	Monthly meetings are held with the El Paso Police Department "Gang Task Force," to discuss and exchange criminal activity and security information. SISD is involved with all eight El Paso County school districts along with every police agency in

						the county in developing a school violence and investigation plan. The plan is expected to be completed during the fall of 1999.
110	Comply with state law and district policies and procedures to ensure consistent application of discipline management practices. (p. 441)	Complete	\$0	\$0	\$0	Campuses use the Student Code of Conduct Violation Report, Law Enforcement Case Information, and Interrogations and Searches forms to document necessary discipline information based on the Student Code of Conduct. Disciplinary occurrences are reported to TEA and to the Department of Student Services in the monthly Campus Discipline Reports.
111	Transfer management of the school resource officer program to the director of Student Services and clearly define the roles and responsibilities of school resource officers. (p. 443)	Complete	\$0	\$0	\$0	In July 1998, SISD transferred the SRO program to the director of Student Services, who coordinates the activities of the SRO with other anti-violence and anti-drug programs. The

						Director of Student Services continues to develop a mutually beneficial working relationship with outside law enforcement agencies.
112	Link the number of attendance officers to attendance rates at district schools. (p. 447)	Complete	\$1,151,775	\$0	\$1,200,000	Three new attendance officer positions have been added and improved attendance rates are anticipated to bring in additional state revenues.
113	Replace five security guards with contracted certified peace officers at KEYS Academy and selected schools. (p. 451)	Complete	(\$63,950)	\$0	\$0	The district decided to use SROs, who are city police officers, and the district's security officers, who are certified as peace officers, at KEYS academy and selected schools. The district accomplished the spirit of the recommendation without additional cost to the district.
114	Negotiate with surrounding school districts to obtain the services of a drug-detecting dog and conduct quarterly spot inspections for drugs on school property. (p. 454)	Complete	(\$3,750)	\$0	\$0	The district negotiated with the Socorro Police Department for the use of a drug-detecting dog. Socorro ISD campuses are using the services of the

						drug-detecting dog at no cost to the district.
115	Develop formal policies and procedures regulating the use of facilities after hours. (p. 456)	Complete	\$0	\$0	\$0	District Administrative Regulation CLA-1 addresses general policy. Principals have primary responsibilities for building use, and are to notify security whenever the building will be used on weekends or during non-duty hours. Also, when Operational Services contracts for maintenance in a building to take place during non-duty hours they are responsible for notifying the Security Department. Operational Services Locksmith maintains a register of all personnel who are issued keys to district buildings.
Totals -Chapter 12			\$1,076,575	\$0	\$1,200,000	
Total			\$6,334,499	\$387,108	\$5,796,320	