

# Transmittal Letter

October 6, 2003

The Honorable Rick Perry, Governor  
The Honorable David Dewhurst, Lieutenant Governor  
The Honorable Thomas R. Craddick, Speaker of the House  
Chief Deputy Commissioner Robert Scott

Fellow Texans:

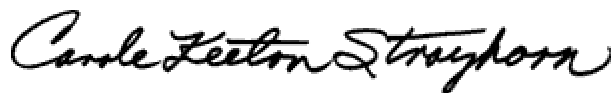
I am pleased to present this report on the progress of the Wilmer-Hutchins Independent School District (WHISD) in implementing my Texas School Performance Review (TSPR) recommendations.

In March 2002, I released the results of my review of the district's operations. This review offered 98 recommendations that collectively could save WHISD taxpayers a net of more than \$7.3 million by 2006-07. The review also noted a number of WHISD's exemplary programs and model services provided by district administrators, teachers, and staff.

In May 2003, we returned to check on how well the district's leadership put these proposals into practice. Over the last year, WHISD has implemented, or is in the process of implementing, 91 of the proposals, or 93 percent. The district has saved a net of nearly \$1.8 million to date, and expects those savings to grow to more than \$8.3 million over five years.

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

Sincerely,



Carole Keeton Strayhorn  
Texas Comptroller

c: Senate Committee on Education  
House Committee on Public Education  
The Honorable Robert F. Deuell, M.D., State Senator, District 2  
The Honorable Royce B. West, State Senator, District 23  
The Honorable Helen Giddings, State Representative, District 109  
The Honorable Jesse Jones, Ph.D., State Representative, District 110

# Progress Report Wilmer-Hutchins Independent School District

October 2003

## **Introduction**

Comptroller Carole Keeton Strayhorn announced her intent to conduct a review of the Wilmer-Hutchins Independent School District (WHISD) in July 2001 at the request of the new superintendent, several board members and constituents concerned about the district's history of leadership instability, mismanagement and lack of financial and educational accountability.

The Texas School Performance Review (TSPR) began work in Wilmer-Hutchins in September 2001. Based upon more than six months of work, the March 2002 report identified WHISD's exemplary programs and suggested concrete ways to improve district operations. If fully implemented, the Comptroller's 98 recommendations could result in net savings of more than \$7.3 million by 2006-07. During May 2003, TSPR staff returned to WHISD to assess the district's progress in implementing the recommendations.

Since 1991, TSPR has recommended more than 7,600 ways to save taxpayers more than \$780 million over five-year periods in more than 100 public school districts throughout Texas. TSPR also conducts follow-up reviews of districts that have had at least one year to implement the recommendations. More than 60 subsequent reviews showed that school districts have acted on more than 90 percent of TSPR's proposals, saving taxpayers nearly \$135 million. The Comptroller's office expects the full savings to grow in the future.

## Improving the Texas School Performance Review

Comptroller Carole Keeton 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 a former teacher, and school board president, the Comptroller has vowed to steer TSPR toward increased accountability 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 benefit the greatest number of students. To ensure this process also serves small districts, reviews of numerous school districts in close proximity, regardless of academic or financial status, are also completed to achieve some economy of scale.

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 TSPR to share best practices and exemplary programs 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 well to keep the solution to itself. Comptroller Strayhorn has directed TSPR to serve as an active clearinghouse of the best and brightest ideas in Texas public education. Best practices identified in the original review are included in the Comptroller's best practices database, *A+ Ideas for Managing Schools (AIMS)*, which is 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 Wilmer-Hutchins ISD**

TSPR began its performance review of WHISD on September 24, 2001 with the assistance of Gibson Consulting Group Inc. - an Austin-based consulting firm. The team interviewed district employees, school board members, parents, business leaders and community members. The team also conducted a public forum in the high school library, on September 27, 2001 from 5:00 p.m. to 8:00 p.m.

To obtain additional comments, the review team also conducted two focus group sessions, one with teachers and one with parents and community members. The Comptroller's office also received letters and phone calls from parents, teachers and community members. To ensure that all stakeholder groups had input, TSPR sent surveys to students, parents, teachers, support staff and administrators at the schools and district offices.

The team received 248 survey responses from: 68 administrative and support staff; five principals and assistant principals; 68 teachers; 43 parents and 64 students.

The review team also consulted two databases of comparative educational information maintained by the Texas Education Agency (TEA), which compiles information from school districts in its Academic Excellence Indicator System (AEIS) and the Public Education Information Management System (PEIMS).

WHISD selected peer districts for comparisons based on similarities in student enrollment, student performance and community and student demographics. WHISD chose DeSoto ISD, Lancaster ISD and LaMarque ISD as its peer districts. TSPR also compared WHISD to district averages in TEA's Regional Education Service Center X (Region 10), to which WHISD belongs, and the state as a whole.

## Wilmer-Hutchins ISD in Profile

WHISD served a culturally diverse population of 2,902 students in 2002-03 in eight schools: one pre-Kindergarten school, four elementary schools, one middle school, one high school and one alternative education school. WHISD's students consisted of 70.4 percent African American, 25.4 percent Hispanic, 3.9 percent White, .2 percent Native American and .1 percent Asian/Pacific Islander. Economically disadvantaged students made up 63.1 percent of the district's student population in 2002-03, a decrease from 68.7 percent in 2001-02. The district's 2002-03 enrollment declined by 123 students from the 3,025 enrollment in 2001-02. Enrollment has steadily declined since 1998-99, when enrollment was 3,651.

TEA rated WHISD overall as *Academically Acceptable* in 2001-02. The rating remained the same for 2002-03 as the state switched from administering the Texas Assessment of Academic Skills (TAAS) test to the Texas Assessment of Knowledge and Skills (TAKS) test. TEA rated C.S. Winn Elementary School as *Recognized* and the other elementary schools, middle school, junior high and high school as *Academically Acceptable*. The alternative and pre-Kindergarten schools did not receive ratings.

In spring of 2003, 94 percent of third grade students passed the reading and math portions of the TAKS. In fifth grade, 75 percent, 76 percent and 77 percent passed reading, math and science, respectively. In sixth grade, 51 percent passed in reading and 59 percent in math. In seventh grade, 65 percent of the students passed reading, 38 percent passed math, and 60 percent passing writing. In eighth grade, 72 percent, 49 percent and 71 percent of students passed reading, math and social studies. In ninth grade, 55 percent of students passed reading and 31 percent passed math. In tenth grade, 29 percent, passed English Language Arts, 25 percent passed math, 60 percent passed social studies and 22 percent passed science. In eleventh grade, 19 percent passed English Language Arts, 25 percent passed math, 48 percent passed social studies and 19 percent passed science.

In 2002-03, the district employed a staff of 421 employees including 221 teachers or 52 percent of all employees. The district also budgeted \$20 million for expenditures in 2002-03 designating \$6,549 per pupil for operating expenditures compared to the state average of \$6,317. That same year, WHISD generated 32.9 percent of WHISD's budgeted revenues through local taxes; 2.0 percent from other local and intermediate sources; 60.2 percent from the state; and 4.9 percent from the federal government.

WHISD budgeted 45.7 cents of every tax dollar on classroom instruction in 2002-03 compared to the state average of 51 cents. The district's tumultuous governance history and high turnover of superintendents continues. Shortly after the report's release, the district fired the superintendent who requested the review and, in December 2002 rehired a former superintendent with 10 years of experience in WHISD.

In January 2003, the district opened the A. L. Morney Learning Center, a preschool serving 29 three- and four-year old students with a capacity to hold 120 students. Board members hope the superintendent's professional and district history and the addition of new educational programs will help reverse the district's declining enrollment trend. The district reports an enrollment of 3,060 students in April 2003 an increase of 35 students from the start of the year. In August 2003, the district also opened a secondary performing arts magnet school.

WHISD participated in groundbreaking ceremonies for a 200 single-family home subdivision within district boundaries in Spring 2003. According to City of Hutchins officials, this is the first major city development in 30 years.

Despite governance issues, WHISD's staff and the TSPR team members have a sense of progress. The district has implemented 61 of the Comptroller's recommendations. The district is working toward completing another 30 recommendations and has accepted five recommendations but not implemented them. WHISD chose to reject two of the review team's recommendations including the first key recommendation that the district petition TEA for official assistance in district governance. **Appendix A** provides the details on the status of each recommendation that TSPR made in its original report.

### Wilmer-Hutchins ISD Report Card

| Chapter                              | Total     | Complete  | In Progress | Not Implemented | Rejected | Percent Complete/In Progress | Grades              |
|--------------------------------------|-----------|-----------|-------------|-----------------|----------|------------------------------|---------------------|
| District Organization and Management | 15        | 8         | 4           | 1               | 2        | 53%/27%                      | Satisfactory        |
| Educational Service Delivery         | 12        | 6         | 5           | 1               | 0        | 50%/42%                      | Satisfactory        |
| Human Resources Management           | 9         | 3         | 5           | 1               | 0        | 33%/56%                      | Satisfactory        |
| Facilities Use and Management        | 9         | 3         | 4           | 2               | 0        | 33%/44%                      | Needs Work          |
| Asset and Risk Management            | 9         | 7         | 2           | 0               | 0        | 78%/22%                      | Satisfactory        |
| Financial Management                 | 10        | 6         | 4           | 0               | 0        | 60%/40%                      | Satisfactory        |
| Purchasing and Warehousing           | 8         | 8         | 0           | 0               | 0        | 100%/0%                      | Excellent           |
| Computers and Technology             | 7         | 5         | 2           | 0               | 0        | 71%/29%                      | Satisfactory        |
| Student Transportation               | 9         | 9         | 0           | 0               | 0        | 100%/0%                      | Excellent           |
| Food Services                        | 4         | 2         | 2           | 0               | 0        | 50%/50%                      | Satisfactory        |
| Safety and Security                  | 6         | 4         | 2           | 0               | 0        | 67%/33%                      | Satisfactory        |
| <b>Overall Grade</b>                 | <b>98</b> | <b>61</b> | <b>30</b>   | <b>5</b>        | <b>2</b> | <b>62%/31%</b>               | <b>Satisfactory</b> |



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

## Exemplary Programs and Practices

WHISD is a school district with some notable successes, and TSPR has identified "best practices." Through commendations in many chapters, the original report highlighted model programs, operations and services provided by WHISD administrators, teachers and staff members. The Comptroller's office encourages other school districts throughout Texas to examine these exemplary programs and services to see if they could be adapted to meet local needs. TSPR lists its original commendations below and provides updated information on each topic in italics underneath the original commendation.

- **WHISD conducted an internal needs assessment to improve district educational service delivery.** Recognizing the need for improvement in academics and student services, the district's director of Research, Development and Planning designed, conducted and published an internal needs assessment highlighting specific programs and services and using disaggregated data when available.

*The district continues to use this original document as an on-going blueprint for advancement in the district.*

- **WHISD raised teacher salaries to remain competitive in the local market.** In order to compete with other local districts, the district effected a teacher pay raise to bolster recruitment efforts and help retain teachers who might leave the district for better pay schedules.

*To improve recruiting and retention efforts, the district's competitive starting teacher salaries of \$37,100, as well as annual stipends of \$1,500 for Bilingual/English as a Second Language, foreign language, math and special education teachers are paired with \$1,000 signing bonuses for new teachers.*

- **WHISD uses grants and business donations to support student and community programs.** In order to promote collaboration between the district and the community, WHISD entered into a collaboration agreement with the John C. Ford Program to provide future assistance in obtaining grants and academic, social and emotional support to the district's students through a variety of programs. Kennedy-Curry Middle School is the only school currently involved in this program. The district additionally received a donation of computers and related equipment from

InterVoice Brite, Inc. valued between \$800,000 and \$1 million in January 2002 to assist in their efforts to provide student and community access to computers.

*District administrators collaborate with local business and community leaders to solicit business donations, volunteer services and grants to fund academic and community efforts. For example, the district spearheaded an in-house tutoring program, Hutchins Academic Center, for students at risk of failing at Kennedy-Curry Middle School. The district recruited four tutors and used a \$25,000 state grant to purchase Reconnect, a computer-based curriculum for credit recovery.*

- **The district efficiently uses cooperative agreements.** WHISD participates in three cooperative purchasing agreements to obtain goods and equipment at reasonable prices while eliminating the effort and expense associated with the bidding process. These agreements save both time and money in the procurement process and ensure district compliance with state laws for the items purchased through cooperative bid participation.

*The district continues to participate in three cooperatives maximizing savings for the district. Through bulk purchases the district reduces administrative effort while complying with all purchasing regulations.*

- **The district increased interest income by diversifying its investment portfolio.** Historically, the district has conservatively invested excess funds into a six-month certificate of deposit. The district changed its investment strategy, as permitted by local investment policy, to include investments in the LoneStar Liquidity Plus Fund to increase interest income.

*During 2002-03, the district maintained investments in the state's LoneStar Liquidity Plus Fund at 1.8 percent interest.*

- **WHISD provides meals exceeding national program standards.** The director of Nutrition Services and cafeteria managers cooperate to carefully plan and prepare breakfast and lunch menus to meet or exceed all nutritional standards set by the National School Lunch and School Breakfast Programs. The district uses NutriKid software to ensure meals adhere to all national dietary guidelines.

*Use of the NutriKid software and careful nutritional planning helped the director of Child Nutrition easily implement more*

*restrictive federal and state nutritional guidelines. The director of Child Nutrition continues to prioritize nutritious meals for students at breakfast and lunch.*

## **TSPR Key Recommendations**

Administrators and staff identified the TSPR recommendations that they said had the greatest impact on district operations. The recommendations are organized by chapter and area of operation in the original report. The comments came from administrators and board members during the TSPR team's follow-up visit to the district.

### **District Organization and Management**

**Recommendation 4: Designate a staff person to develop, review and update board policies and disseminate policy information to the public.**

**Recommendation 6: Prepare more detailed board minutes and improve the report format.** The district assigned an administrative assistant to the board to develop, review and update board policies and disseminate policy information to the public. This reorganization and delegation of duties also allowed the board to prepare more detailed board minutes and track board member training. After the board's administrative assistant compiled training folders for each of the board members during 2002-03, all members exceeded the number of recommended training hours required by the state. The board president said dedicating an administrative assistant to the board has improved the efficiency with which it handles routine records maintenance and administrative functions.

### **Educational Service Delivery,**

**Recommendation 23: Examine special education referral and identification methods and incorporate more effective strategies into the Student Support Committee process.** District administrators noted completion of this recommendation as key because the district turned the special education program under state scrutiny with an assigned monitor during 2002, into a program found by TEA to be compliant with applicable federal and state regulations. In February 2003, TEA removed the monitor from the district.

To achieve this status, the director of Special Education implemented a new referral process based upon the legal framework of TEA's Child-Centered Special Education Process. The district also implemented a database system to monitor the progress and outcome of all special education referrals, provide compliance due dates to administrators and

generate weekly and monthly reports for the district's diagnostic and teaching staff.

The director of Special Education also worked as part of a United States Office of Special Education Programs focus group that wrote and produced, *An Administrator's Guide, The Pre-referral Intervention Process: Addressing Over-Representation of African American Students in Special Education*, in conjunction with IDEA Partnerships of the Council for Exceptional Children and the National Alliance of Black School Educators. This staff participation provided the district with a unique opportunity to provide in-house professional development to special education, general education and administrative staff in the pre-referral and referral processes and all aspects of academically serving students with special needs at no cost.

### **Financial Management**

**Recommendation 61: Close the Tax Office and enter into an interlocal agreement with Dallas County to collect the district's property taxes.** WHISD's board acted quickly after the report release and closed the Tax Office transferring all regular collection efforts to Dallas County for 2002-03. Administrators identified this recommendation as key because collection rates as of March 2003 increased generating \$453,456 more in revenues compared to revenues received at the same time in 2002.

Basing savings on 2003 increased revenues and salary savings from the Tax collector/assessor and Tax clerk positions which total \$74,014 annually, the district projects five-year savings to be almost double those projected in the original report.

**Recommendation 64: Hire an internal auditor to report directly to the Board of Trustees.** The Texas State Auditor's Office recommends that all school districts with annual expenditures of more than \$20 million and with more than 5,000 students have an internal auditor position. With a 2002-03 budget of \$20 million, WHISD met the recommended financial criteria. District administrators said they prioritized this recommendation and hired an internal auditor that reports to the superintendent in March 2003 after completing a thorough hiring process. Although reporting to the superintendent, the internal auditor gives scheduled report to the board. The district agreed that the internal auditor will help ensure that WHISD spends funds for intended purposes and will further help in identifying waste and unnecessary spending.

### **Purchasing and Warehousing**

**Recommendation 65: Develop and implement purchasing procedures that include a system of internal controls.**

**Recommendation 68: Close the district's supply warehouse and order supplies on a just-in-time basis.** The director of Business and director of Purchasing considered these two recommendations as the most significant for the purchasing functions. An administrator said Purchasing Department staff have significantly improved purchase order processing. Developing and using a purchasing manual has been exceptionally useful in training department and school staff on purchasing rules and procedures.

The district closed its supply warehouse using the facility as storage for lawnmowers and maintenance equipment as recommended in the original report. The district reassigned the warehouse clerk to another administrative position within the district and realized \$110,000 in savings from maintenance costs and the salaries for the supervisor and delivery/maintenance employees. The board recognized that many of the previously stored items can be acquired through the just-in-time procurement method. The district purchases most supplies on a just-in-time basis now.

### **Student Transportation**

**Recommendation 80: Issue Request for Proposals to outsource student transportation.** District administrators identified this recommendation as the most significant in the entire report because the district improved the efficiency and cost-effectiveness of transportation services. The district negotiated a contract favoring the district including reimbursement for half of the cost of several buses in 2001-02. To date, the district has realized more than \$311,000 in operational savings in one year and based on these figures, expects five-year savings to reach more than \$1.2 million.

In addition to financial savings, the district has eliminated a variety of associated transportation problems including departmental record keeping and program monitoring problems, inefficient routing and poor customer service and inadequate driver training. The new contractor, Dallas County Schools provides the district with monthly reports, efficiently schedules routes, trains drivers, handles employee discipline, supervises employees, tracks on-time performance, properly maintains buses and provides the district with a bus replacement schedule. The decision to outsource transportation services helped the district to complete many of the other chapter recommendations.

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

WHISD has made progress towards implementing TSPR's recommendations. The district has implemented 61 recommendations, 30 are in various stages of progress and five have been reviewed but have not been addressed. The district chose not to implement two of the review team's recommendations. This section addresses the key areas that require additional attention from the district.

### **Board Governance**

Stabilizing leadership and board governance continues to be at issue in the district.

TSPR recommended the board develop and implement a Code of Conduct and provide communication training (Recommendation 5) to delineate respective roles between the superintendent and the board and establish a means of self-censorship. Although the district developed the Code of Conduct and a majority of members attended a variety of professional development and training, pending lawsuits alleging election tampering and slanderous comments from within the board suggest the board has not fully implemented a method of "self censorship." Board members continue to air public and legal disagreements.

TSPR urges board members to adhere collectively and individually to the Code of Conduct and consider imposing sanctions or additional training to address infractions. In addition board members may consider ethics training as part of annual professional development. The board is encouraged to remove discussion of any personal or private disagreements from board functions.

To increase representation of district areas historically unrepresented on the board, TSPR also recommended the district change its board member election to increase the number of single-member district positions from three to five (Recommendation 3). The district rejected this recommendation saying all members are currently elected at-large providing anyone in the district with the opportunity to vote. The district has 16 precincts, three (#3331, #3549 and #3905) have no registered voters, one (#3809) has five or fewer and three (#3517, #3556 and #3800) have less than 50. Of the 12,553 registered voters in the district's 16 precincts, 2,203 voted in the May 2003 election for six of the nine board seats. No voters cast ballots in five of the precincts in the May 2003 elections and four precincts recorded votes of 15 or less. TSPR urges the district to partner with the community in voting registration efforts and to



initiate actions to ensure representation in the underrepresented areas of the district.

### **Student Performance**

While progress has been made in improving the quality of education the district's TAKS scores show the district still has a work to be done. Grade three scores of 94 percent passing rates in math and reading are encouraging, but the district does not want to fail the students in the middle and high school grades. Sixty percent or less of the students in high school passed all tested areas of the TAKS. TSPR encouraged the district to use student achievement data (Recommendation 18) to improve student performance. While the district filled a vacant director of Curriculum position (Recommendation 16), challenges in instruction remain. The director of Curriculum used 2001-02 TAAS data to provide professional development (Recommendation 22) in 2002-03 and is using the TAKS scores to similarly mold training for teachers in 2003-04. The district must ensure this training is directly correlated to student achievement every year.

The district has also developed curriculum guides (Recommendation 17) and should ensure all teachers are trained for full implementation to help ensure students master basic information before transitioning to the next grade. The district's teachers, while competitively paid, must be certified and know the material that they present to students. The district should continue working with representatives from Region 10 to increase national and state recruiting efforts (Recommendation 32).

### **Bilingual Education**

While the district revised and detailed a Bilingual Education program manual for 2002-03, documented bilingual education training for teachers districtwide and provided a \$1,500 stipend to bilingual teachers, the district still has significant work to do to implement a high-quality program (Recommendation 26). During 2002-03, the district received \$92,565 in bilingual funds from the state, and in December 2002, TEA issued a district effectiveness and compliance (DEC) report of the bilingual education/English as a Second Language program. TEA found the district to be noncompliant in 16 of 26 assessed areas.

TSPR urges WHISD to immediately address identified deficiencies, increase efforts to recruit qualified bilingual education teachers and retrain existing teachers to provide students in the program with quality services. In addition, TSPR further recommends the district begin offering bilingual education to three- and four-year old students in a proactive measure and

students in grades Pre-K through 3 where there are 20 or more identified students per grade level, in accordance with law.

### **Facilities Use and Management**

WHISD has taken small steps toward developing a long-range facilities master plan (Recommendation 37) including use of a consultant to complete and present a facilities needs study to the board in March 2003. The needs assessment completed by the Texas Association of School Administrators (TASA), confirms what TSPR identified over a year ago (Recommendation 38), the district's facilities are in grave condition. TASA told district officials that all facilities except Wilmer-Hutchins High School are rated unacceptable according to industry standards with only 6 percent of the district's classroom space deemed operational.

The district must aggressively develop a long-range facility plan and include energy efficient retrofits into construction and renovation plans to ensure the safety of students and staff housed daily in the district's buildings.

## **WHISD's Ideas for Improving the Texas School Performance Review**

TSPR 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 process, TSPR asked WHISD staff members and administrators to discuss what went right and what went wrong-and how the process could be improved.

The feedback TSPR has received from other districts led to improvements in the review process. For example, early reports did not include implementation strategies, and districts told TSPR they needed help 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 implementing the recommendations. It is important for TSPR to continually be mindful of things that did not work as intended so the review process can be improved.

Wilmer-Hutchins administrators and board members made the following observations.

Two key administrators said that they felt the report was very thorough, and the most significant changes since the report release were the change in district leadership and the management of the Business Office.

The board members, superintendent and key administrators said that the report helped the district focus on operational issues and continue to emphasize education and the resiliency of students and staff amidst adversarial situations.

A key administrator said the report assisted them on tackling some difficult projects and obtaining services such as outsourcing transportation, which the district had been unable to accomplish in the past. The state's issuance of a report provided credibility and lent weight to making these changes through provided documentation, implementation strategies and calculated fiscal impacts.

All board members and key administrators agreed that the perception of the district's image as a whole is very important and continues to be a key issue for future growth.

Key administrators also said that some corrections sent from the district after reviewing a draft of the report were not addressed in the final report.

While it appears some comments were received without adequate documentation to support a change, TSPR will examine the tracking sheets used to obtain comments and corrections to determine if clarifying language should be added specifying that no factual or numeric changes will be made to reported findings without supporting documentation.

# Appendix A

## Status of Recommendations and Savings

Part 1

### PART 1

| Rec. #                                                  | Recommendation                                                                                                                 | Implementation Status | TSPR's Projected Five-Year Savings (Costs) | Actual Savings (Costs) to Date | WHISD's Five-Year Savings (Costs) Estimates | Comments                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|---------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------|-----------------------|--------------------------------------------|--------------------------------|---------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Chapter 1 - District Organization and Management</b> |                                                                                                                                |                       |                                            |                                |                                             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| 1                                                       | Request a Texas Education Agency master to oversee the district and ensure compliance with state law. p. 31                    | Rejected              | (\$78,780)                                 | \$0                            | \$0                                         | The board rejected this recommendation saying they did not want nor did not need the state to intervene in district affairs. The board perpetuated the district's history of high superintendent turnover by firing the superintendent that requested the review and rehiring a former superintendent in December 2002. In addition, pending lawsuits alleging election tampering and slander from within the board suggest the board has not fully implemented a method of self censorship. |
| 2                                                       | Track board member training and develop sanctions to ensure compliance with state requirements for continuing education. p. 34 | In Progress           | \$0                                        | \$0                            | \$0                                         | The district provided a detailed listing of all board member training documenting that current members exceed state requirements for professional development. As of                                                                                                                                                                                                                                                                                                                         |

|   |                                                                                                                               |             |            |            |            |                                                                                                                                                                                                                                                                                                                       |
|---|-------------------------------------------------------------------------------------------------------------------------------|-------------|------------|------------|------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|   |                                                                                                                               |             |            |            |            | September 2002, the board's administrative assistant maintains folders for all board members that include proof of all training attended. The district, however, has not adopted any sanctions should a member fail to comply with state continuing education requirements.                                           |
| 3 | Change the election of three to five board positions to single-member districts. p. 36                                        | Rejected    | \$0        | \$0        | \$0        | The board rejected this recommendation responding that all citizens were adequately represented by the current board membership as elected in May 2003.                                                                                                                                                               |
| 4 | Designate a staff person to develop, review and update board policies and disseminate policy information to the public. p. 37 | Complete    | \$0        | \$0        | \$0        | The district assigned the duty of updating board policy to the board's administrative assistant.                                                                                                                                                                                                                      |
| 5 | Develop and implement a Board Code of Conduct and provide communication training. p. 41                                       | In Progress | (\$10,000) | (\$20,778) | (\$68,778) | The board developed a Code of Conduct and attended a variety of professional development offerings including communication training during 2002-03. According to sitting board members, individual trustees have initiated legal actions against each other. The board spent \$20,778 in professional development and |

|   |                                                                                                                       |                 |           |     |     |                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---|-----------------------------------------------------------------------------------------------------------------------|-----------------|-----------|-----|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|   |                                                                                                                       |                 |           |     |     | training expenses in 2002-03, yet anticipates \$12,000 in expenditures annually from 2003-04 through 2006-07.                                                                                                                                                                                                                                                                                                                                           |
| 6 | Prepare more detailed board minutes and improve the report format. p. 43                                              | Complete        | \$0       | \$0 | \$0 | The board's administrative assistant prepares more detailed board minutes according to a revised format and includes information about issue debates, community and member comments and voting records not included in transcribed minutes prior to 2002-03.                                                                                                                                                                                            |
| 7 | Develop an organizational structure to reflect a logical alignment of duties and adequate span of control. p. 45      | Complete        | \$0       | \$0 | \$0 | In conjunction with this recommendation, the district filled the vacant director of Curriculum position, eliminated Tax Office positions and the supply warehouse and hired an internal auditor. In addition, the district designated an administrative assistant to the board and hired a chief of police to replace the former director of Safety and Security. All associated costs or savings are reflected in appropriate chapter recommendations. |
| 8 | Create an in-house counsel position requiring experience in labor and school law to assist the board with governance. | Not Implemented | \$289,582 | \$0 | \$0 | Although the district showed this recommendation as complete, the board has not employed in-house counsel in the spirit of                                                                                                                                                                                                                                                                                                                              |

|    |                                                                                                                               |             |           |     |     |                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----|-------------------------------------------------------------------------------------------------------------------------------|-------------|-----------|-----|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | compliance, litigation and the development of policies and procedures. p. 49                                                  |             |           |     |     | the recommendation. In April 2003, the district authorized a contract extension through August 2007 with its primary general counsel. The primary counsel is currently practicing law under a fully probated suspension lasting from July 1, 2003 though December 31, 2003.                                                                                                                                                                       |
| 9  | Adopt a policy to request and analyze proposals for outside legal services every three years through formal agreements. p. 51 | In Progress | \$0       | \$0 | \$0 | While the district adopted a policy to this effect and executed a formal agreement with its delinquent tax attorney for the first time, the district continues to have a high number of lawsuits and uses the same attorneys for district representation. Despite new policy, the district is still in the process of analyzing its own process of tracking lawsuits and legal costs before requesting and analyzing new legal service proposals. |
| 10 | Designate an individual to maintain the district's records and document the procedure for information requests. p. 53         | Complete    | \$0       | \$0 | \$0 | The board administrative assistant fulfills these duties and has maintained a log of all open records requests since summer 2002.                                                                                                                                                                                                                                                                                                                 |
| 11 | Form a strategic planning committee with broad representation from                                                            | In Progress | (\$7,500) | \$0 | \$0 | The superintendent and director of Business developed a draft of a strategic plan for 2003-                                                                                                                                                                                                                                                                                                                                                       |



|    |                                                                                                                                                                               |          |             |     |     |                                                                                                                                                                                                                                                                                     |
|----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-------------|-----|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | the district and community to develop the district's strategic plan and overhaul the district and campus improvement plans processes. p. 60                                   |          |             |     |     | 04 through 2006-07. The district plans to include parental, community, staff and board input in the final draft of this strategic plan.                                                                                                                                             |
| 12 | Document budgeting priorities, procedures and a calendar and contract for specific board member training. p. 64                                                               | Complete | (\$24,750)  | \$0 | \$0 | The district developed a budget calendar, distributed detailed packets to key administrators and board members and conducted a budget workshop for all board members using existing board training funds.                                                                           |
| 13 | Create a coordinator of Community Involvement position to act as a liaison between central administration and campus staff, and between the district and the community. p. 70 | Complete | (\$215,460) | \$0 | \$0 | The district reassigned an existing administrator as a Public Information Officer fulfilling the duties outlined in the report. This position acts as a community outreach liaison as well as a liaison between campus and central staff and administrators.                        |
| 14 | Implement creative methods to involve parents. p. 72                                                                                                                          | Complete | \$0         | \$0 | \$0 | The district hosts quarterly workshops for parents including academic topics, counseling opportunities and district news. The district's Public Information officer also works with principals and campus staff to increasingly involve parents and business leaders as volunteers. |
| 15 | Develop a system to                                                                                                                                                           | Complete | \$0         | \$0 | \$0 | The district's Public                                                                                                                                                                                                                                                               |

|  |                                                                                                      |  |                   |                   |                   |                                                                                                                                                                                                                                                        |
|--|------------------------------------------------------------------------------------------------------|--|-------------------|-------------------|-------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | manage media relations that identifies positive events that should be reported to local media. p. 73 |  |                   |                   |                   | Information officer regularly communicates with staff and community members through publication of a district newspaper including positive district news. The district produces the newspaper in conjunction with one of the district's media classes. |
|  | <b>Totals-Chapter 1</b>                                                                              |  | <b>(\$46,908)</b> | <b>(\$20,778)</b> | <b>(\$68,778)</b> |                                                                                                                                                                                                                                                        |

**Chapter 2 - Educational Service Delivery**

|    |                                                                                                                                                                    |          |             |            |             |                                                                                                                                                                                                                                                                                                                                                             |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-------------|------------|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 16 | Fill the vacant director of Curriculum and Instruction position and create a districtwide organizational Curriculum and Instruction responsibilities roster. p. 88 | Complete | \$0         | \$0        | \$0         | The district filled this position internally and created a separate Curriculum and Instruction Department. The district further reorganized and designated curriculum duties at each school as identified on a districtwide organizational chart.                                                                                                           |
| 17 | Develop a comprehensive curriculum plan and add curriculum guides. p. 92                                                                                           | Complete | (\$147,000) | (\$31,000) | (\$155,000) | Immediately following the release of the report, the director of Curriculum assembled a 31-member curriculum writing team that reviewed curriculum plans and scope and sequence guides from Round Rock ISD, Lancaster ISD, Fort Worth ISD and Garland ISD. The team developed a curriculum development, review and update schedule according to a five-year |

|    |                                                                                                                                                                        |             |     |     |     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----|-----|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                                                                                        |             |     |     |     | <p>plan. During summer 2002, the team divided into math, English/Language Arts, science and social studies groups and wrote curriculum guides for initial use during 2002-03. During summer 2003, the district's curriculum writing team developed guides for Fine Arts, Music, Physical Education and Health providing stipends to the curriculum team. The district anticipates similar expenditures annually.</p>                                                                                                                                 |
| 18 | <p>Use student achievement data, including course grades and achievement test scores, to identify student and teacher needs and improve student performance. p.101</p> | In Progress | \$0 | \$0 | \$0 | <p>The district's director of Curriculum reviewed 2002 TAAS data, classroom performance and other student performance results to produce a needs assessment to guide 2002-03 instruction. Identified weak areas included math problem solving, reading summarization, writing, spelling, capitalization and punctuation. The district implemented six-week performance benchmarks to identify areas of growth, student strengths and weaknesses that will continue to guide instruction in the years ahead. The district has analyzed the spring</p> |

|    |                                                                                             |             |             |            |             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
|----|---------------------------------------------------------------------------------------------|-------------|-------------|------------|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                             |             |             |            |             | 2003 TAKS data and has produced a needs assessment to guide 2003-04 instruction. The district plans to continue to use student performance data to identify any performance trends that may require intervention.                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 19 | Develop strategies to increase the number of students taking college entrance exams. p. 104 | In Progress | \$0         | (\$5,000)  | (\$25,000)  | The district expanded this recommendation to enhance overall academic opportunities for its students and uses a variety of strategies to encourage students to take college entrance exams. Strategies include before- and after-school tutoring, increased Advanced Placement course offerings, a credit recovery program and an extended day program. The district obtained college entrance preparation materials at a cost of \$5,000 and scheduled quarterly workshops to inform parents and students about higher education opportunities. Effective 2003-04, district administrators plan to monitor the number of students taking and passing college entrance exams. |
| 20 | Add a third-year foreign language course to the high                                        | Complete    | (\$211,800) | (\$84,720) | (\$423,600) | To enhance recruiting of a foreign language teacher for 2002-03. the                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

|    |                                                                                                                    |          |            |     |     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----|--------------------------------------------------------------------------------------------------------------------|----------|------------|-----|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | school master schedule, and hire a language teacher. p. 105                                                        |          |            |     |     | district included a \$1,500 foreign language stipend and a \$1,000 new teacher sign-on bonus in its advertising efforts. The district added new sections of Spanish III and French II and hired two additional foreign language teachers for \$84,720 annually.                                                                                                                                                                                                                                                                                                                 |
| 21 | Develop a formal program evaluation plan, process and schedule including use of a consistent report format. p. 107 | Complete | (\$72,000) | \$0 | \$0 | The district developed a program evaluation manual as identified in its own 2000-01 needs assessment. The manual details districtwide program evaluation efforts including use of a standardized evaluation form, surveys, completion procedures and a review schedule for all programs districtwide. The district uses program evaluation results to identify professional development needs. Initial TSPR costs included contract data programming services at \$100 per hour or \$14,400 annually. Instead, the district completed all data-programming in-house at no cost. |
| 22 | Train teachers in the interrelationships among TEKS, TAKS, national and local standards. curriculum                | Complete | \$0        | \$0 | \$0 | In August 2002 and 2003, the district cooperated with Region 10 to offer comprehensive staff                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |

|    |                                                                                                                                                            |          |     |     |     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----|-----|-----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | guides, school reform initiatives, student assessments and data analysis. p. 110                                                                           |          |     |     |     | development on the Texas Essential Knowledge and Skills (TEKS), TAKS and their interrelationships. The district also provided training in Gifted and Talented Education, special education, Administrative and Instructional Technology and modified strategies for use with students at risk of failure or with special needs. The district adopted minimum requirements for districtwide staff development.                                                                                                                        |
| 23 | Examine special education referral and identification methods and incorporate more effective strategies into the Student Support Committee process. p. 115 | Complete | \$0 | \$0 | \$0 | WHISD implemented a new referral process in 2002-03 based on the legal framework of TEA's Child-Centered Special Education Process and a data-based system to monitor the progress and outcome of all special education referrals. The director of Special Education streamlined the initial referral process from two steps to a single step and uses the electronic database to track referrals, provides due dates and generate weekly and monthly reports for the district's diagnostic staff. The director of Special Education |

|    |                                                              |             |           |          |          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----|--------------------------------------------------------------|-------------|-----------|----------|----------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                              |             |           |          |          | <p>worked with a U.S. Office of Special Education Programs focus group that wrote and produced, <i>An Administrator's Guide, The Pre-referral Intervention Process: Addressing Over-Representation of African American Students in Special Education</i>, in conjunction with IDEA Partnerships of the Council for Exceptional Children and the National Alliance of Black School Educators.</p>                                                                                                                  |
| 24 | Fully participate in Medicaid reimbursement programs. p. 117 |             |           |          |          | <p>In August 2002, the district renewed a contract with a vendor to provide School Health and Related Services (SHARS) Medicaid reimbursements through October 2003. The vendor provides quarterly reimbursement services at a cost of 13 percent of annually reimbursed funds. The vendor also provides a comprehensive list of services eligible for reimbursement. The district SHARS administrator is working to ensure principals use this list to increase reimbursement requests for eligible services</p> |
|    |                                                              | In Progress | \$249,755 | \$10,622 | \$55,234 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

|    |                                                                                                                                   |             |             |     |     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|----|-----------------------------------------------------------------------------------------------------------------------------------|-------------|-------------|-----|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                                                   |             |             |     |     | outside of those already submitted for special education. The district received \$10,622 in reimbursed funds for special education services in 2002-03. Ensuring all principals use the vendor's eligibility list and identify and file all eligible claims, the district estimates a 5 percent increase in savings each year. This equates to future annual savings of \$11,153.                                                                                                                                                                                               |
| 25 | Restructure the compensatory education program, and incorporate specific plans into district and campus improvement plans. p. 121 | In Progress | \$0         | \$0 | \$0 | While WHISD included specific plans to detail and expend compensatory education funds in its District Improvement Plans (DIP) and Campus Improvement Plans (CIPs) for 2003-04, administrators are still reviewing and restructuring that program. The district's compensatory funds decreased from \$902,262 in 2001-02 to \$785,829 in 2002-03. In addition, the district only expended 76 percent of the 2002-03 designated funds as of June 2003. The district plans to coordinate all compensatory education expenditures in 2003-04 through a centralized tracking system. |
| 26 | Implement a high-                                                                                                                 | Not         | (\$961,220) | \$0 | \$0 | The district has not vet                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |



|    |                                                                                                    |             |            |             |             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----|----------------------------------------------------------------------------------------------------|-------------|------------|-------------|-------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | quality bilingual education program. p. 125                                                        | Implemented |            |             |             | fully implemented this recommendation. Although the district created a detailed program manual, provided bilingual training to teachers and implemented a \$1,500 bilingual teaching stipend, the district continues to be out of compliance with 16 of 26 areas monitored by TEA and documented in a December 2002 District Effectiveness and Compliance (DEC) visit.                                                                                                                                                                                      |
| 27 | Fully implement the <i>Texas State Plan for the Education of Gifted/Talented Students</i> . p. 127 | In Progress | (\$37,500) | (\$200,000) | (\$200,000) | WHISD administrators conducted a districtwide Gifted and Talented (G/T) program evaluation and addressed deficiencies in G/T teacher training at the elementary, junior and high school levels by providing professional development opportunities within budgeted funds. The district offers Advanced Placement and individualized instruction courses at the middle and high school levels and a pull-out program at the elementary level for students in the G/T program. In the spirit of this recommendation, the board opened a magnet school for the |

|                                               |                                                                                                                              |             |                      |                    |                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|-----------------------------------------------|------------------------------------------------------------------------------------------------------------------------------|-------------|----------------------|--------------------|--------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                               |                                                                                                                              |             |                      |                    |                    | performing arts in August 2003, at a cost of \$200,000 and serving nearly 100 students. The magnet school offers accelerated learning courses, Advanced Placement courses and a variety of music, art, theatrical and production courses as well as general education courses to secondary students.                                                                                                                                                                                                                                                                                             |
|                                               | <b>Totals-Chapter 2</b>                                                                                                      |             | <b>(\$1,179,765)</b> | <b>(\$310,098)</b> | <b>(\$748,366)</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| <b>Chapter 3 - Human Resources Management</b> |                                                                                                                              |             |                      |                    |                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 28                                            | Implement staffing allocation formulas and reduce the number of central administrator and educational aide positions. p. 135 |             |                      |                    |                    | Although the district reorganized several functions, eliminated some positions and reallocated staff from some eliminated areas to others, the district is in the process of reviewing staffing formulas for districtwide implementation. The district outsourced transportation and moved that director to the position of director of Benefits. The district also closed the Tax Office and the Supply Warehouse and outsourced maintenance realizing savings from eliminated salaries in conjunction with those specific recommendations. However, the district is also in the process of re- |
|                                               |                                                                                                                              | In Progress | \$3,132,380          | \$0                | \$0                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |

|    |                                                                                                                                                                                  |             |     |     |     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----|-----|-----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                                                                                                  |             |     |     |     | evaluating all educational aide positions.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| 29 | Update all employee job descriptions. p. 137                                                                                                                                     | Complete    | \$0 | \$0 | \$0 | The director of Human Resources updated all job descriptions in summer 2002 to accurately reflect duties and functions performed.                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 30 | Create a formal staffing plan that includes a system for tracking staffing allocation and student enrollment, staff turnover, reasons for leaving and other key measures. p. 139 | In Progress | \$0 | \$0 | \$0 | The WHISD administrators created a new organizational chart identifying districtwide positions and the director of Human Resources is working with the school and central administrators to develop a formalized staffing plan. The district improved student enrollment tracking through PEIMS and attendance training provided prior to 2002-03 and 2003-04 to attendance clerks and the central PEIMS coordinator. The district's central PEIMS coordinator instituted a PEIMS reporting manual and the director of Human Resources tracking reasons employees left in 2002-03. |
| 31 | Increase professional requirements for Human Resources Department employees. p. 141                                                                                              | In Progress | \$0 | \$0 | \$0 | Human Resources Department staff attended professional development training regarding benefits and                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

|    |                                                                                                               |             |     |     |     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----|---------------------------------------------------------------------------------------------------------------|-------------|-----|-----|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                               |             |     |     |     | personnel functions. Due to internal staff transfers to this area, however, the district is continuing to provide training opportunities.                                                                                                                                                                                                                                                                                                                                         |
| 32 | Create and implement a recruiting and retention plan to decrease the number of non-certified teachers. p. 147 | In Progress | \$0 | \$0 | \$0 | The director of Human Resources is working with Region 10 to document and to increase state and national recruiting efforts. The district offers a competitive salary structure including a \$1,000 signing bonus for new teachers as well as \$1,500 stipends for teachers in identified areas of need to increase the number of certified teachers.                                                                                                                             |
| 33 | Create and implement a staff development plan that includes instructional and non-instructional staff. p. 148 | Complete    | \$0 | \$0 | \$0 | The district created a vision for staff and professional development. The district uses in-house trainers, such as the director of Special Programs who participated in national training efforts, the director of Child Nutrition and 10 staff to provide comprehensive and on-going training for professional and non-instructional staff. Due to outsourcing the district does not provide bus driver training. The district bases instructional training on review of student |

|    |                                                                                                                                                                                   |                 |                    |            |            |                                                                                                                                                                                                                                                                                                                                                    |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------|--------------------|------------|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                                                                                                   |                 |                    |            |            | performance.                                                                                                                                                                                                                                                                                                                                       |
| 34 | Review and update personnel policies. p. 150                                                                                                                                      | In Progress     | \$0                | \$0        | \$0        | While the director of Human Resources reorganized file management and personnel data in 2002-03 and instituted new procedures guiding districtwide personnel functions, the board has not considered all personnel policies presented for consideration prioritizing, outsourced opportunities and closing several departments in 2002-03 instead. |
| 35 | Remove illegal requests for information from all applications. p. 152                                                                                                             | Complete        | \$0                | \$0        | \$0        | The district immediately implemented this recommendation. The Human Resources Department staff updated job descriptions and revised application and file information to comply with applicable federal and state laws.                                                                                                                             |
| 36 | Revise the district's at-will policy to include all personnel except those positions required to be under contract by law and those positions designated as key personnel. p. 153 | Not Implemented | \$0                | \$0        | \$0        | District administrators said this is one of the recommendations that the board has not yet examined. The district is not rejecting this recommendation nor making a decision regarding implementation until the board fully reviews current contracts and practices.                                                                               |
|    | <b>Totals-Chapter 3</b>                                                                                                                                                           |                 | <b>\$3,132,380</b> | <b>\$0</b> | <b>\$0</b> |                                                                                                                                                                                                                                                                                                                                                    |

**Chapter 4 - Facilities Use and Management**

|    |                                                                                              |                 |            |            |            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----|----------------------------------------------------------------------------------------------|-----------------|------------|------------|------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 37 | Develop a comprehensive long-range facilities master plan. p. 160                            | In Progress     | (\$11,550) | (\$16,400) | (\$16,400) | The district contracted with Texas Association of School Administration (TASA) at a cost of \$16,400 to conduct a comprehensive facilities needs assessment presented to the board in March 2003. To date, the district has not made any specific facilities' construction or renovation decisions in addition to the opening of the magnet school, and the early learning center. The TASA report illustrates the grave condition of the districts physical facilities deeming all but the high school as unsafe and only 6 percent of classrooms districtwide as operations. On September 8, 2003 board members voted to consider a bond for future construction. |
| 38 | Combine four existing elementary schools into three and adjust attendance boundaries. p. 163 | Not Implemented | \$606,972  | \$0        | \$0        | The district did not make any decisions regarding the combination of elementary schools and attendance boundaries. The district has not ruled this out, but is not yet prepared to make a decision on this recommendation.                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 39 | Annlv for the                                                                                | Not             | \$0        | \$0        | \$0        | The district did not                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

|    |                                                                                                                              |             |           |           |           |                                                                                                                                                                                                                                                                     |
|----|------------------------------------------------------------------------------------------------------------------------------|-------------|-----------|-----------|-----------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | Qualified Zone Academy Bond (QZAB) program to enable renovations at existing schools and for new school construction. p. 166 | Implemented |           |           |           | apply for QZAB funds in summer 2002 because no long-range construction plans were finalized and funds were unavailable. The district plans to apply for QZAB funds in fall 2003 in anticipation of 2004 funding.                                                    |
| 40 | Privatize the maintenance and grounds functions with the exception of a few multi-purpose maintenance staff. p. 171          | Complete    | \$0       | \$100,000 | \$500,000 | The district re-evaluated maintenance expenditures and contracted for maintenance services at Kennedy-Curry Middle School and Wilmer Hutchins High School. The director of Business reports savings of \$100,000 annually due to the elimination of five employees. |
| 41 | Implement an automated system to manage work orders. p. 173                                                                  | In Progress | \$0       | \$0       | \$0       | The director of Maintenance is working with the director of Technology to implement an automated work order system in fall 2003 including in-house training and using existing software.                                                                            |
| 42 | Apply a modified industry standard of at least 17,000 square feet per custodian across all schools. p. 174                   | Complete    | \$325,520 | \$65,104  | \$325,520 | The district reduced custodial staff by four positions districtwide by applying a modified industry standard. District administrators report that despite the reduction in staff, the schools are cleaner. Many staff and students are also involved in             |

|    |                                                                                    |             |            |          |           |                                                                                                                                                                                                                                                                                                                              |
|----|------------------------------------------------------------------------------------|-------------|------------|----------|-----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                    |             |            |          |           | collaborative efforts to improve school cleanliness by consciously disposing of trash and learning about the environment.                                                                                                                                                                                                    |
| 43 | Develop a comprehensive and mandatory training program for custodial staff. p. 175 | Complete    | (\$22,480) | \$0      | \$0       | The district provided in-house training to custodial personnel and assigned campus accountability for overall maintenance efforts to principals. Principals include maintenance and custodial efforts in campus goals.                                                                                                       |
| 44 | Use the LoanSTAR program to identify and finance energy retrofits. p. 178          | In Progress | \$0        | \$78,000 | \$100,000 | The district plans to include information obtained from the State Energy Conservation Office in future construction and renovation efforts. In the spirit of the recommendation, the district negotiated a 29-month energy contract saving \$78,000 with a total projected savings of \$100,000 over that contracted period. |
| 45 | Institute an energy awareness campaign at each school. p. 179                      | In Progress | \$7,300    | \$500    | \$2,500   | The district instituted an energy awareness campaign at its elementary schools and plans to expand the program to the middle school, alternative school, high school and new performing arts school. The district projects savings of \$500 annually.                                                                        |



|                                              |                                                                                                                 |          |                  |                  |                  |                                                                                                                                                                                                                                                                                                                   |
|----------------------------------------------|-----------------------------------------------------------------------------------------------------------------|----------|------------------|------------------|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                              | <b>Totals-Chapter 4</b>                                                                                         |          | <b>\$905,762</b> | <b>\$227,204</b> | <b>\$911,620</b> |                                                                                                                                                                                                                                                                                                                   |
| <b>Chapter 5 - Asset and Risk Management</b> |                                                                                                                 |          |                  |                  |                  |                                                                                                                                                                                                                                                                                                                   |
| 46                                           | Restructure the bank depository agreement and sweep combined daily balances into overnight investments. p. 189  | Complete | \$80,860         | \$16,172         | \$80,860         | The director of Business and the district's accountant restructured the bank depository agreement to include nightly sweep investments.                                                                                                                                                                           |
| 47                                           | Combine all activity fund bank accounts into one interest bearing account. p. 190                               | Complete | \$5,450          | \$0              | \$4,260          | The district's accountant established one interest bearing bank account in summer 2003 for all school activity funds. Starting in 2003-04, earnings are based on \$1,190 annually less a \$500 one-time cost for printing and initial check fees. The accountant will monitor all banking transactions centrally. |
| 48                                           | Establish a committee to manage the transition to the state health plan. p. 196                                 | Complete | \$0              | \$0              | \$0              | The district included representatives from food service, maintenance, teaching staff and administrative staff on the district's Health plan transition committee. Committee members provided Health plan information to districtwide employees in fall 2002.                                                      |
| 49                                           | Identify workers' compensation claims by worker classification and develops strategies to reduce claims. p. 199 | Complete | \$0              | \$0              | \$0              | The director of Human Resources established a Safety Committee with representation from each of the districts' campuses to review workers' compensation data by classification                                                                                                                                    |

|    |                                                                                                                                                                                |             |            |           |            |                                                                                                                                                                                                                                                                    |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|------------|-----------|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                                                                                                |             |            |           |            | with the district's insurance carrier. The vendor provides workers compensation claims analysis to the district quarterly with detailed information of all new and outstanding claims. The vendor also provides recommendations for closing claims.                |
| 50 | Cancel the premium finance agreement and pay insurance premiums in full when they are due. p. 201                                                                              | Complete    | \$5,850    | \$1,170   | \$5,850    | The district canceled the finance agreement and pays insurance premiums in full when they are due. As a result, the district earns interest income of \$1,170 annually.                                                                                            |
| 51 | Establish policies and procedures to classify items with a unit cost of \$5,000 or more as fixed assets and those with a unit cost of \$500 or more as inventory items. p. 204 | Complete    | \$0        | \$0       | \$0        | The board approved a new policy classifying items with a value of \$5,000 and greater as fixed assets and those between \$500 and \$4,999 as inventory items. The district used the same figures for the fixed asset inventory conducted by a vendor in July 2002. |
| 52 | Assign individual accountability for fixed asset custody to principals and department heads in WHISD. p. 205                                                                   | Complete    | \$0        | \$0       | \$0        | The district assigned campus accountability for all fixed assets to individual principals. This includes departmental assets and building assets.                                                                                                                  |
| 53 | Hire a consultant to update the district's fixed asset database and perform an annual physical                                                                                 | In Progress | (\$17,500) | (\$9,000) | (\$19,500) | The district hired a vendor to perform a comprehensive fixed asset physical inventory. The                                                                                                                                                                         |

|    |                                                                                                                                          |             |                 |                 |                  |                                                                                                                                                                                                                                                                                                                       |
|----|------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----------------|-----------------|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | inventory. p. 206                                                                                                                        |             |                 |                 |                  | consultant provided the district with a detailed accounting summary of all assets totaling \$17.5 million as of July 2002. After an initial cost of \$5,500 in summer 2002 and \$3,500 in summer 2003, the district anticipates a cost of \$3,500 in 2004-05 through 2006-07 for inventory updates.                   |
| 54 | Establish board policy addressing accountability for district property and prosecute persons found with stolen district property. p. 208 | In Progress | \$0             | \$50,000        | \$200,000        | The district established its own police force after reviewing similar organizations and included prosecution of persons with stolen property in its new guidelines. The district projects significant reductions of stolen and missing property resulting in annual savings of \$50,000 from 2003-04 through 2006-07. |
|    | <b>Totals-Chapter 5</b>                                                                                                                  |             | <b>\$74,660</b> | <b>\$58,342</b> | <b>\$271,470</b> |                                                                                                                                                                                                                                                                                                                       |

# Appendix A

## Status of Recommendations and Savings

### Part 2

#### PART 2

| Rec. #                                  | Recommendation                                                                                                                | Implementation Status | TSPR's Projected Five-Year Savings (Costs) | Actual Savings (Costs) to Date | WHISD's Five-Year Savings (Costs) Estimates | Comments                                                                                                                                                                                                                                                                                                                                                                                   |
|-----------------------------------------|-------------------------------------------------------------------------------------------------------------------------------|-----------------------|--------------------------------------------|--------------------------------|---------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Chapter 6 - Financial Management</b> |                                                                                                                               |                       |                                            |                                |                                             |                                                                                                                                                                                                                                                                                                                                                                                            |
| 55                                      | Establish clear lines of responsibility and institute internal control procedures in the Business Services Department. p. 222 | Complete              | (\$356,832)                                | \$0                            | \$0                                         | The superintendent reassigned some business duties from the Business Services Department to the internal auditor, himself and the accountant to clearly define lines of responsibility and ensure adequate internal control. The superintendent assigned the business manager as the director of Business. The district did not incur any new salary expenditures for this recommendation. |
| 56                                      | Establish an organized accounts payable filing system. p. 224                                                                 | In Progress           | \$0                                        | \$0                            | \$0                                         | The district designated a new accounts payable clerk who received training from the district's accountant and from Region 10. The district is in the process of reorganizing all district files according to new and previous vendor lists. The district no longer maintains blank, signed requisition forms in non-secure locations within                                                |

|    |                                                                                                                                 |             |     |     |     |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|----|---------------------------------------------------------------------------------------------------------------------------------|-------------|-----|-----|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                                                 |             |     |     |     | the Purchasing Department.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| 57 | Cross-train accounts payable and payroll processing personnel. p. 225                                                           | In Progress | \$0 | \$0 | \$0 | In spring 2003, the district initiated cross-training efforts between Accounts Payable and Payroll staff also establishing written procedures to ensure continuity of service in the event an individual in either area were absent for any reason.                                                                                                                                                                                                                                                                                                                                         |
| 58 | Identify the district's financial constraints and budgetary goals for the next five years. p. 230                               | In Progress | \$0 | \$0 | \$0 | The district's Budget Planning Committee, board and administrative staff attended budget training to clarify the budgeting process. The committee reviewed budget calendars and processes in Dallas ISD and Fort Worth ISD. The board also changed the district's fiscal year to end on June 30. The Budget Planning Committee continues to work to identify the district's financial goals and constraints according to a five-year strategic plan. The district has not yet made any bond decisions regarding future construction issues which would greatly impact the long-term budget. |
| 59 | Establish a Finance Committee to provide the board with detailed financial reports that compare actual versus budgeted revenues | In Progress | \$0 | \$0 | \$0 | The district's Finance Committee includes the superintendent, director of Business, director of Benefits, accountant, and director of Purchasing. The director of Business                                                                                                                                                                                                                                                                                                                                                                                                                  |

|    |                                                                                                                                 |          |             |           |             |                                                                                                                                                                                                                                                           |
|----|---------------------------------------------------------------------------------------------------------------------------------|----------|-------------|-----------|-------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | and expenditures every month. p. 231                                                                                            |          |             |           |             | is coordinating the committee and has begun providing monthly financial reports to the board including actual expenditures and revenues to budgeted expenditures and revenues.                                                                            |
| 60 | Conduct actuarial studies to determine potential liabilities and appropriate reserve levels. p. 235                             | Complete | (\$8,000)   | (\$7,000) | (\$7,000)   | The district conducted actuarial studies in spring 2003 for a one-time cost and identifying reserve amounts after determination of all liabilities. Liabilities include those from workers' compensation and health insurance claims.                     |
| 61 | Close the Tax Office and enter into an interlocal agreement with Dallas County to collect the district's property taxes. p. 238 | Complete | \$1,390,188 | \$527,470 | \$2,637,350 | The district closed its Tax Office and outsourced tax collection services to Dallas County realizing an increase of \$453,456 in collected taxes as of March 2003 and \$74,014 in annual savings from the Tax Assessor/Collector and Tax Clerk positions. |
| 62 | Execute a written contract with the delinquent tax collection attorney. p. 241                                                  | Complete | \$0         | \$0       | \$0         | Effective August 1, 2002, the district executed a two-year renewable contract with its delinquent tax collection attorney.                                                                                                                                |
| 63 | Establish written procedures to monitor the district's responses to the external auditor's recommendations. p. 245              | Complete | \$0         | \$0       | \$0         | The district used the implementation steps TSPR report as written procedures to monitor and document management responses and recommendations from the district's external auditors.                                                                      |

|    |                                                                              |          |                    |                  |                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|----|------------------------------------------------------------------------------|----------|--------------------|------------------|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 64 | Hire an internal auditor to report directly to the Board of Trustees. p. 246 |          |                    |                  |                    | Although the district had an unfilled and budgeted internal auditor position during the review, WHISD did not re-post the position until November 2002. The district hired an internal auditor using budgeted funds in March 2003. The position reports to the director of Business and appears on the district's organization chart under Business Services. However, the director of Human Resources noted the internal auditor reports directly to the superintendent. |
|    |                                                                              | Complete | \$0                | \$0              | \$0                |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|    | <b>Totals-Chapter 6</b>                                                      |          | <b>\$1,025,356</b> | <b>\$520,470</b> | <b>\$2,630,350</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |

**Chapter 7 - Purchasing and Warehousing**

|    |                                                                                                                                              |          |           |     |     |                                                                                                                                                                                                                                                                                 |
|----|----------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------|-----|-----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 65 | Develop and implement purchasing procedures that include a system of internal controls. p. 257                                               |          |           |     |     | The district's accountant and director of Purchasing drafted a comprehensive and detailed purchasing manual in spring 2002 for implementation in 2003-04. The purchasing manual includes procedures and a series of checks and balances creating a system of internal controls. |
|    |                                                                                                                                              | Complete | (\$2,500) | \$0 | \$0 |                                                                                                                                                                                                                                                                                 |
| 66 | Develop procedures to comply with state purchasing laws and hold department managers and purchasing staff responsible for compliance. p. 261 |          |           |     |     | The district included procedures in its purchasing manual specifying compliance with state purchasing regulations. The district assigned oversight of the Purchasing Department to the director of Business.                                                                    |
|    |                                                                                                                                              | Complete | \$0       | \$0 | \$0 |                                                                                                                                                                                                                                                                                 |

|    |                                                                                                                       |          |           |           |           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |
|----|-----------------------------------------------------------------------------------------------------------------------|----------|-----------|-----------|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 67 | Develop an implementation plan for the conversion to the Region 10 automated purchasing system. p. 263                | Complete | \$0       | \$0       | \$0       | WHISD implemented Region 10's automated purchasing system including specifics about online procurement using this system in its purchasing manual. The district also maintains a separate manual in the Purchasing Office dedicated solely to online purchasing through the automated system.                                                                                                                                                                                                                                                                                     |
| 68 | Close the district's supply warehouse and order supplies on a just-in-time basis. p. 264                              | Complete | \$565,015 | \$110,000 | \$550,000 | The district closed its supply warehouse prior to 2002-03 converting the facility to storage for its lawnmowers and maintenance equipment. The district simultaneously reassigned the warehouse clerk to another administrative position and realized \$110,000 in annual savings from the salaries for the eliminated supervisor and delivery/maintenance positions and maintenance costs. The warehouse supervisor retired and the district did not fill the vacant position. Many of the previously stored items are now acquired through the just-in-time procurement method. |
| 69 | Establish a contracting process and assign a staff member in the Business Office to monitor vendor compliance. p. 267 | Complete | \$0       | \$0       | \$0       | Since the TSPR review, the district's director of Business reviews vendor compliance with assistance from the director of Purchasing who monitors all                                                                                                                                                                                                                                                                                                                                                                                                                             |



|    |                                                                     |          |           |            |             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|----|---------------------------------------------------------------------|----------|-----------|------------|-------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                     |          |           |            |             | contracts. The district established an evaluation criteria worksheet for use annually with all district vendors.                                                                                                                                                                                                                                                                                                                                                                                   |
| 70 | Develop contracting standards for construction contracts. p. 268    | Complete | \$0       | \$0        | \$0         | The board adopted construction standards included in the district's purchasing manual. The standards include to contracting provisions, bidding evaluation procedures and bonding regulations. District administrators said these standards will be essential as the district evaluates future construction and renovation projects.                                                                                                                                                               |
| 71 | Develop a textbook ordering and management system. p. 270           | Complete | \$0       | (\$45,000) | (\$225,000) | The district prioritized this recommendation by hiring a textbook administrator at \$45,000 annually. The district's Purchasing Department staff worked with the textbook administrator to detail textbook requests, orders and subsequent tracking and management procedures. In fall 2002, the district hired a textbook administrator at an annual cost of \$45,000 who then received professional development training and reviewed textbook management techniques from neighboring districts. |
| 72 | Develop and implement a districtwide textbook accountability system | Complete | \$164,310 | (\$5,500)  | \$131,128   | The district's newly developed Purchasing Manual includes a section detailing textbook                                                                                                                                                                                                                                                                                                                                                                                                             |

|  |                                                             |  |                  |                 |                  |                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|--|-------------------------------------------------------------|--|------------------|-----------------|------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | and hold all schools accountable for lost textbooks. p. 271 |  |                  |                 |                  | reporting and return procedures. Principals are responsible for all textbooks issued at individual campuses and report information at the beginning and end of each year using textbook tracking software installed districtwide with Region 10 assistance. The district invested \$5,500 for the software in 2002-03 and expects full implementation in 2003-04 with projected savings of \$34,157 annually beginning in 2003-04. |
|  | <b>Totals-Chapter 7</b>                                     |  | <b>\$726,825</b> | <b>\$59,500</b> | <b>\$456,128</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                    |

**Chapter 8 - Computers and Technology**

|    |                                                                                                                                                                     |             |             |           |             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-------------|-----------|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 73 | Develop a coherent plan to pursue outside funding sources including federal, state and local grants and funds from local businesses and private foundations. p. 278 | In Progress | \$1,082,075 | \$976,000 | \$2,976,000 | The director of Technology maintains a listing of all technology related grants and works with the chief of police to pursue other outside funding sources. For example, the district received \$800,000 in donated computers, software and hardware from a local business installed during 2002-03 and 150 Compaq laptop computers and 200 desktop computers from Allen ISD valued at \$150,000. The chief of police also procured additional donations totaling \$26,000 in 2002-03 and projects annual grant, donation and outside funds to |
|----|---------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-------------|-----------|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|

|    |                                                                                               |          |     |            |            |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
|----|-----------------------------------------------------------------------------------------------|----------|-----|------------|------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                               |          |     |            |            | conservatively reach \$500,000 annually through 2006-07.                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| 74 | Develop and test a disaster recovery plan and create written backup procedures. p. 281        | Complete | \$0 | \$0        | \$0        | The district developed an emergency response team, associated contact numbers and positions, a tape backup plan and system restoration procedures including data and hardware recovery. The district is working with Region 10 and backs up cross volume and servers daily, weekly and monthly. The district stores the information off-site, and has written procedures for all associated disaster recovery functions.                                                                                                             |
| 75 | Reorganize the Technology Committee to develop and implement a formal technology plan. p. 283 | Complete | \$0 | (\$20,000) | (\$20,000) | The district reorganized the Technology Committee in fall 2002 submitting a comprehensive technology plan to the board that included an inventory and assessment of present technology; goals, objectives, timelines and a budget for future acquisitions; funding sources; accountability measures; staff development; assessment and evaluation measures; software and hardware standardization, Web page publishing guidelines; and professional technology training and goals. The district upgraded the boardroom technology at |

|    |                                                                                                                                                                    |             |     |     |     |                                                                                                                                                                                                                                                                                                                          |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|-----|-----|-----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                                                                                    |             |     |     |     | a one-time cost of \$20,000 including electronic voting, recording and laptop capabilities. The district controlled costs by using in-house maintenance staff, students for tile and woodwork and one electrician.                                                                                                       |
| 76 | Establish districtwide policies and procedures that require all technology purchase requisitions to have the written approval of the Technology Department. p. 285 | Complete    | \$0 | \$0 | \$0 | The district included technology purchase procedures and requirements in its comprehensive purchasing manual. The director of Technology approves all technology purchases in writing prior to submission to the Purchasing Department for approval.                                                                     |
| 77 | Develop a districtwide process for managing the hardware inventory. p. 288                                                                                         | Complete    | \$0 | \$0 | \$0 | The director of Technology detailed and distributed written inventory procedures to manage computers and associated hardware at the beginning and ending of each school year. The director of Technology also began using a database to control the location of all hardware, including transfers and missing equipment. |
| 78 | Electronically track all technical support requests and response times to improve efficiency and effectiveness of technical support. p. 289                        | In Progress | \$0 | \$0 | \$0 | The director of Technology is implementing help desk software to track and improve the district's response time for both software and hardware questions and repairs.                                                                                                                                                    |

|                                           |                                                                         |          |           |           |             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-------------------------------------------|-------------------------------------------------------------------------|----------|-----------|-----------|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                           |                                                                         |          |           |           |             | Questions and repairs can be submitted via e-mail or phone and are maintained electronically.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
| 79                                        | Develop written standards for personal computers. p. 290                |          |           |           |             | The district created minimum personal computer standards based on a four-year asset life cycle for entry level/mainstream systems and a three-year life for power user configurations. The director of Technology conducted a comprehensive inventory of districtwide hardware and software and included detailed information about the district's equipment and software and hardware compatibility in published documents. District administrators report the detailed information has helped the Technology Department staff provide better support to the district's users and has mitigated potential compatibility problems when new hardware, software or upgrades are purchased. |
|                                           | <b>Totals-Chapter 8</b>                                                 | Complete | \$0       | \$0       | \$0         |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| <b>Chapter 9 - Student Transportation</b> |                                                                         |          |           |           |             |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| 80                                        | Issue Request for Proposals to outsource student transportation. p. 306 |          |           |           |             | The district contracted with Dallas County Schools (DCS) for transportation services in August 2002. The district saved \$311,312 in the first year that included \$84.133 for new buses                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |
|                                           |                                                                         | Complete | \$429,910 | \$311,312 | \$1,220,028 |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |

|    |                                                                                                                                       |          |            |     |     |                                                                                                                                                                                                                                                                                                                                                 |
|----|---------------------------------------------------------------------------------------------------------------------------------------|----------|------------|-----|-----|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                                                       |          |            |     |     | purchased in 2002. The district expects \$227,179 in annual savings through 2006-07. Administrators report that outsourcing transportation functions has increased efficiency, cost-effectiveness and safety of provided services.                                                                                                              |
| 81 | Implement a performance-monitoring program to measure accomplishments and identify areas for improvement. p. 312                      | Complete | \$0        | \$0 | \$0 | The district transportation developed performance indicators with DCS to measure productivity, annual costs, safety, service quality, personnel and vehicle maintenance effectiveness. DCS also provides written quarterly reports at scheduled meetings to district administrators.                                                            |
| 82 | Develop a procedure for evaluating routes and schedules on a periodic basis and redesign routes and schedules where indicated. p. 314 | Complete | \$0        | \$0 | \$0 | According to the district's contract with DCS, the vendor cooperatively analyzes and develops transportation routes and pick-up points districtwide, throughout each school year. The vendor provides all routing information to the district for distribution to students, staff and the community prior to the beginning of each school year. |
| 83 | Expand the driver and monitor training programs, and perform annual driver evaluations. p. 316                                        | Complete | (\$21,265) | \$0 | \$0 | As requested by the district and stipulated in the agreement with DCS, the vendor provides all drivers and bus monitors. DCS has the sole authority for employing.                                                                                                                                                                              |

|    |                                                                                                                                                  |          |           |     |     |                                                                                                                                                                                                                                                     |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------|-----|-----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                                                                  |          |           |     |     | assigning and dismissing drivers and monitors and provides training within the financial limits of the contract.                                                                                                                                    |
| 84 | Develop and implement a procedure to identify vandals and recover damage costs. p. 318                                                           | Complete | \$34,860  | \$0 | \$0 | The district implemented this recommendation as part of guidelines for the district's police force established in 2002-03. Buses are operated and maintained by the outsourced vendor, the district will not recover any costs for incurred damage. |
| 85 | Use dispatch and radio equipment to track driver performance and on-time performance and develop procedures for radio use in emergencies. p. 320 | Complete | \$0       | \$0 | \$0 | DCS monitors on-time performance for all district routes since August 2002 notifying campus and central administrators if buses are late or delayed. District officials said parents and staff report no significant complaints about bus delays.   |
| 86 | Adopt a long-range vehicle replacement plan. p. 322                                                                                              | Complete | \$0       | \$0 | \$0 | The district established a 15-year replacement cycle for large buses and an 11-year replacement cycle for mini buses. DCS provides bus purchase requirements annually and equally shares replacement costs                                          |
| 87 | Establish a formal preventive maintenance plan that uses a calendar schedule. p. 324                                                             | Complete | \$0       | \$0 | \$0 | DCS regularly schedules maintenance and maintains all buses used for districtwide transportation.                                                                                                                                                   |
| 88 | Schedule training for, and implement. the                                                                                                        | Complete | (\$1,407) | \$0 | \$0 | DCS provided training in 2002-03 for the district on                                                                                                                                                                                                |

|                                   |                                                                            |             |                  |                  |                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
|-----------------------------------|----------------------------------------------------------------------------|-------------|------------------|------------------|--------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|                                   | Vehicle Maintenance Information System.<br>p. 325                          |             |                  |                  |                    | its computerized maintenance system as part of the establishes contract.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|                                   | <b>Totals-Chapter 9</b>                                                    |             | <b>\$442,098</b> | <b>\$311,312</b> | <b>\$1,220,028</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| <b>Chapter 10 - Food Services</b> |                                                                            |             |                  |                  |                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |
| 89                                | Identify all students eligible for free and reduced-price meals.<br>p. 335 |             |                  |                  |                    | In 2002-03, the district sent application forms home with students at the beginning of the year, posted registration posters in the cafeterias and administration offices and encouraged enrollment in parent meetings to identify eligible students for free and reduced-price meals. Despite these efforts, the percent of economically disadvantaged students however, decreased 68.7 percent in 2001-02 to 63.1 percent in 2002-03. The director of Child Nutrition expects an increase in students identified for free and reduced price meals in 2003-04 through 2006-07. Based on original report calculations, a increase in identified students at \$553 each should result in \$62,213 in additional compensatory education funds annually for 2004-05 through 2006-07. Because this funding is based on the prior six-month average of eligible students funds during 2003-04 would equal \$24,885. |
|                                   |                                                                            | In Progress | \$622,125        | \$0              | \$211,524          |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |



|                          |                                                                                                                                   |             |                  |            |                  |                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------|-------------|------------------|------------|------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 90                       | Eliminate operational barriers and implement new programs to increase meal participation. p. 339                                  | In Progress | \$0              | \$0        | \$0              | The director of Child Nutrition continues to research and implement effective strategies to increase meal participation within the district. The district is implementing the Grab-and-Go breakfast at the high school in 2003-04 to increase secondary breakfast participation rates.                                                                                                                    |
| 91                       | Compile and distribute monthly financial data to all cafeteria managers. p. 341                                                   | Complete    | \$0              | \$0        | \$0              | Technology Department staff installed a district-level server improving software integration functions and allowing the director of Child Nutrition to receive all necessary information to compile and distribute monthly financial data to the district's cafeteria managers. In addition, the director of Child Nutrition conducted districtwide training for cafeteria managers on financial reports. |
| 92                       | Use all of the features of the point-of-sale system to generate the reports that are necessary to evaluate the department. p. 342 | Complete    | \$0              | \$0        | \$0              | The director of Child Nutrition trained staff at all campuses to generate point-of-sale reports including details such as types and numbers of items sold, students served and times served. The director uses these reports for program evaluation purposes.                                                                                                                                             |
| <b>Totals-Chapter 10</b> |                                                                                                                                   |             | <b>\$622,125</b> | <b>\$0</b> | <b>\$211,524</b> |                                                                                                                                                                                                                                                                                                                                                                                                           |

**Chapter 11 - Safety and Security**

|    |                                                                                                                                                                    |          |           |           |           |                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|----|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|-----------|-----------|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 93 | Position law enforcement officers in plain sight of all students, staff and parents. p. 352                                                                        | Complete | \$0       | (\$5)     | (\$5)     | In 2002-03, the district's chief of police increased the presence of WHISD law enforcement officers both before and after school at Wilmer-Hutchins High School and Kennedy-Curry Middle School as well as in the hallways during class changes. In addition, officers perform lunch monitoring duties. To facilitate increased patrolling efforts, the district obtained five police vehicles for \$1 each through the state's surplus procurement system available to state agencies. |
| 94 | Require all staff to wear picture identification badges, provide a numbered visitor badge for all district visitors and post check-in signs in plain sight. p. 353 | Complete | (\$8,606) | \$0       | \$0       | In August 2002, principals enforced a districtwide directive from the superintendent that all staff and faculty wear identification badges. The district, however, did not require these badges to include pictures and produced the badges using existing funds. Principals also posted signs in all campus administrative offices directing all visitors to sign-in and get a visitor's pass or badge.                                                                                |
| 95 | Re-key the district locks and establish a district policy and a set of procedures designed to track all district keys. p. 356                                      | Complete | (\$8,935) | (\$8,935) | (\$8,935) | The district rekeyed all locks for a one-time cost in summer 2002, replaced existing padlocks and combination locks and developed new procedures to track key                                                                                                                                                                                                                                                                                                                           |

|    |                                                                                                                                                                 |             |            |     |           |                                                                                                                                                                                                                                                                                                                                                                                               |
|----|-----------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------|------------|-----|-----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                                                                                 |             |            |     |           | <p>distribution and return districtwide. The superintendent, principals, director of Maintenance and the director of Business have master keys mitigating the risk of unknown personnel entering district facilities without authorization. All administrators and principals attended training on the new policies and specific key procedures in 2002-03.</p>                               |
| 96 | <p>Eliminate outstanding safety hazards to improve district safety. p. 358</p>                                                                                  | In Progress | (\$12,945) | \$0 | \$0       | <p>The district now requires all campus principals to ensure maintenance personnel eliminate identified facility hazards and report progress to district administrators. For example, in 2002-03, principals labeled all hazardous chemicals and materials and stored such items in accordance with state and federal regulations. The district continues to address outstanding hazards.</p> |
| 97 | <p>Establish a truancy management plan addressing truancy, attendance and dropout prevention and raise the district's attendance rate to 94 percent. p. 362</p> | In Progress | \$576,000  | \$0 | \$512,000 | <p>In April 2003, the board approved a comprehensive WHISD Truancy Management Plan Handbook including detailed strategies to help the district raise attendance rates and decrease truancy and dropout rates. The district's attendance/truancy officer researched best practices in truancy management and</p>                                                                               |

|    |                                                                                                                 |          |                    |                    |                    |                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|----|-----------------------------------------------------------------------------------------------------------------|----------|--------------------|--------------------|--------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    |                                                                                                                 |          |                    |                    |                    | consulted with staff from Dallas ISD and Fort Worth ISD prior to developing WHISD's truancy plan. The officer also attended a half-day training seminar on truancy management techniques. The district is implementing the plan in 2003-04 and estimates a minimum of \$128,000 in annual savings based upon an increase of 32 students at \$4,000 each in new state aid as originally calculated in the report. The district did not realize any savings in 2002-03. |
| 98 | Provide the truancy officer with online access and spreadsheet applications to track truancy statistics. p. 364 | Complete | \$0                | \$0                | \$0                | The district's director of Technology and staff provided the attendance/truancy officer with online access in 2002-03 and an attendance spreadsheet that alerts the officer to truanancies. The spreadsheet also provides district administrators with updated attendance records. The district provided training to principals and campus attendance clerks regarding truancy, attendance reporting requirements and software applications in 2002-03.               |
|    | <b>Totals-Chapter 11</b>                                                                                        |          | <b>\$545,514</b>   | <b>(\$8,940)</b>   | <b>\$503,060</b>   |                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|    | <b>TOTAL</b>                                                                                                    |          | <b>\$7,330,122</b> | <b>\$1,793,012</b> | <b>\$8,343,036</b> |                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |