TRANSMITTAL LETTER

February 5, 2003

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

Fellow Texans:

I am pleased to present my performance review of the Brownsville Independent School District (BISD).

This review is intended to help BISD hold the line on costs, streamline operations, and improve services to ensure that more of every education dollar goes directly into the classroom with the teacher and children, where it belongs. To aid in this task, I contracted with Gibson Consulting Group, Inc.

I have made a number of recommendations to improve BISD's efficiency. I also have highlighted a number of "best practices" in district operations - model programs and services provided by the district's administrators, teachers, and staff. This report outlines 101 detailed recommendations that could save BISD more than $49.1 million over the next five years, while reinvesting more than $8.2 million to improve educational services and other operations. Net savings are estimated to reach nearly $40.9 million that the district can redirect to the classroom.

I am grateful for the cooperation of BISD's board, staff, parents and community members. I commend them for their dedication to improving the educational opportunities for our most precious resource in BISD - our children.

I am also pleased to announce that the report is available on my Window on State Government Web site at www.window.state.tx.us/tspr/brownsville/.

Sincerely,
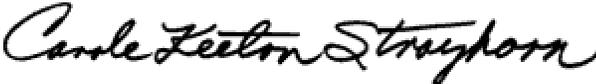
Carole Keeton Strayhorn
Texas Comptroller

EXECUTIVE SUMMARY

In September 2002, Texas Comptroller Carole Keeton Strayhorn began a review of the Brownsville Independent School District (BISD) at the request of the BISD Board of Trustees, who agreed to pay 25 percent of the cost of the review. Based upon more than five months of work, this report identifies BISD's exemplary programs and suggests concrete ways to improve district operations. If fully implemented, the Comptroller's 101 recommendations could result in net savings of nearly $40.9 million over the next five years.

Improving The Texas School Performance Review

Soon after taking office in January 1999, Texas Comptroller Carole Keeton Strayhorn consulted school district officials, parents and teachers from across Texas and carefully examined past reviews and progress reports to make TSPR more valuable to the state's school districts. With the perspective of a former teacher and school board president, the Comptroller has vowed to use TSPR to increase local school districts' accountability to the communities they serve.

Recognizing that only 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. Comptroller Strayhorn also has ordered TSPR staff to share best practices and exemplary programs quickly and systematically with all the state's school districts and with anyone else who requests such information. Comptroller Strayhorn has directed TSPR to serve as a clearinghouse of the best ideas in Texas public education.

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

- Ensure students and teachers receive the support and resources necessary to succeed;
- Identify innovative ways to address the district's core management challenges;
- Ensure administrative duties are performed efficiently, without duplication, and in a way that fosters education;
- Develop strategies to ensure the district's processes and programs are continuously assessed and improved;
- 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 a business in the Yellow Pages can do that job better and at a lower cost.

Finally, Comptroller Strayhorn has opened her door to Texans who share her optimism about the potential for public education. Suggestions to improve Texas schools or the school reviews are welcome at any time. The Comptroller believes public schools deserve all the attention and assistance they can get.

For more information, contact TSPR by calling toll-free 1-800-531-5441, extension 5-3676, or see the Comptroller's Website at www.window.state.tx.us .

TSPR In Brownsville ISD

On April 9, 2002 the Brownsville Independent School District (BISD) board voted to request a Texas School Performance Review (TSPR) and to pay 25 percent of the $350,000 cost.

Comptroller Strayhorn selected Brownsville for a review in April 2002 and onsite work began in September 2002. Through a competitive bidding process, the Comptroller's office selected Gibson Consulting Group, an Austin based firm, to assist the agency with the review. The review team interviewed district employees, school board members, parents, business leaders and community members and held five public forums at each of the five high schools on September 3, 4 and 5, 2002 from 5:00 p.m. to 8:00 p.m.

Under a different Comptroller, TSPR reviewed BISD in 1994. The report contained 143 recommendations with projected gross savings of more than $23 million over five years and proposed more than $4.5 million in reinvestments to improve the district's educational services and other operations. In 1995 a progress report showed that BISD had implemented 138 of the 143 recommendations. In all, 97 percent of the recommendations were implemented and the district reported saving more than $3.3 million.

To obtain additional comments, the review team conducted nine focus group sessions with teachers, principals, parents and community members. To ensure that all stakeholder groups had input, TSPR also sent surveys to students, parents, teachers, campus and central administrators and support staff.

A total of 1,223 respondents answered surveys. One hundred forty-eight administrative and support staff;23 principals and assistant principals; 158

teachers; 276 parents and 618 students completed written surveys as part of the review. While these surveys were not scientifically administered, the results are included here to show the general opinion of those responding. Details from the surveys and public forums appear in **Appendices A** through **F**.

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

BISD selected peer districts for comparisons based on similarities in student enrollment, student performance and community and student demographics. The selected peer districts were Corpus Christi, Laredo, North East, Plano and Ysleta ISDs. TSPR also compared BISD to district averages in TEA's Regional Education Service Center I (Region 1), to which BISD belongs, and to the state as a whole.

In May 2002, the district's board changed membership and current officers assumed their respective positions. On June 6, 2002, after the suspension of Dr. Noe Sauceda, the board appointed Johnny I. Pineda as interim superintendent. Findings in this report are based on data that pertains to events and situations that occurred over a period of time. Therefore, efforts have been made to identify and reference whether events and situations pertain to the former or current administration. Because surveys were distributed in August 2002, responses may be directed toward either the former or current administration or board.

During its five-month review, TSPR developed 101 recommendations to improve operations and save taxpayers more than $49.1million by 2007-08. Cumulative net savings from all recommendations (savings minus recommended investments or expenditures) could reach nearly $40.9 million by 2007-08.

A detailed list of costs and savings by recommendation appears in **Exhibit 4**. Many TSPR recommendations would not have a direct fiscal impact, but would improve the district's overall operations.

Brownsville ISD

The Brownsville Independent School District (BISD) is the 18th largest school district in the state, serving more than 42,500 students in 50 schools, including five high schools, 10 middle schools, 32 elementary schools and three alternative schools. The district is located within Cameron County in the city of Brownsville, the state's southernmost city, which is on the Mexican border. The city is 25 miles from the Gulf of

Mexico and is within minutes of South Padre Island, a popular resort island. In spite of a growing economy and employment opportunities, Brownsville has a low per capita income, with more than half of the households earning less than $25,000 per year. Almost 90 percent of the city's population over age 5 speaks a language other than English.

Students are 97.6 percent Hispanic, 2.0 percent Anglo, 0.1 percent African American and 0.2 percent Asian/Pacific Islander. Teachers are 81.3 percent Hispanic, 18.1 percent Anglo, 0.2 percent African American and 0.4 percent other. About 92.8 percent of BISD students are economically disadvantaged.

While BISD was rated by TEA in 2001-02 as an *Academically Acceptable* district and has no low performing schools, pass rates lag more than 7 percentage points behind the state average; 74.8 percent of all students are passing the Texas Assessment of Academic Skills (TAAS) as compared to a statewide average of 82.1 percent and a regional average of 77.9 percent.

Exhibit 1 details the demographic characteristics of BISD and its peer school districts.

Exhibit 1
Demographic Characteristics of BISD,
Peer School Districts , Region 1 and State
2001-02

District	Student Enrollment	Racial/Ethnic Percent				Economically Disadvantaged	Limited English Proficiency
		African American	Hispanic	Anglo	Other		
Brownsville	**42,541**	**0.1%**	**97.7%**	**2.0%**	**0.3%**	**92.8%**	**43.8%**
Corpus Christi	39,383	5.6%	71.8%	21.2%	1.4%	56.8%	8.0%
Laredo	23,188	0.1%	99.0%	0.8%	0.1%	96.2%	58.9%
North East	53,030	9.6%	39.5%	48.0%	2.8%	35.0%	3.9%
Plano	48,944	7.7%	10.9%	66.7%	14.8%	10.4%	8.6%
Ysleta	46,742	2.3%	88.8%	8.0%	1.0%	77.9%	24.6%
Region 1	**314,566**	**0.2%**	**95.9%**	**3.5%**	**0.4%**	**84.5%**	**N/A**
State	**4,146,653**	**14.4%**	**41.7%**	**40.9%**	**2.8%**	**50.5%**	**N/A**

BISD served 42,541 students during 2001-02, an increase of 5.5 percent over the last five years **(Exhibit 2)**.

Exhibit 2
BISD Student Enrollment History

School Year	Actual Student Enrollment	Percent Change from 1997-98
1997-98	40,324	NA
1998-99	40,262	(0.15%)
1999-2000	40,195	(0.32%)
2000-01	40,898	1.42%
2001-02	42,541	5.50%

The district has more than 6,500 full-time employees; slightly more than 44 percent are teachers. The district's 2001-02 budget was $323.7million, an increase of 15.9 percent over the 2000-01 annual budget of $279.2 million. BISD spent 47.5 cents of every dollar on instruction in 2001-02, which is almost 7 percent lower than the 51-cent state average.

BISD is a property-poor district, ranking within the lowest 6 percent of school districts in the state. BISD's 2001 tax rate was $1.466 per $100 value; $1.428 for Maintenance and Operations and $0.038 for debt service. In 2001-02, BISD's property value was $67,201 per student, compared to the state average of $234,607 per student.

While TSPR found many exemplary programs and practices being carried out by dedicated and hardworking employees of the district, the district is facing a number of challenges including:

- Stabilizing governance;
- Strengthening controls over purchasing;
- Reorganizing the management structure to focus on instruction;
- Controlling staffing levels; and
- Improving the budget and operational processes.

Key Findings and Recommendations

Stabilize Governance

Ensure that all board members understand their roles and responsibilities, and those of district management by developing operating procedures and a self-monitoring system. Conflicts among board members and between the board majority and the former superintendent have contributed to an atmosphere of distrust in the administration of the district. Since 1991 there have been seven superintendents and an internal management team, resulting in instability in district management. Some employees have had their main duties taken away and many employees are uncertain of their future with the district. Developing a board code of conduct that identifies board roles and responsibilities and instituting a self-monitoring system, will enable the board to more effectively focus its attention on the education of BISD students.

Eliminate all board committees and establish a Committee of the Whole to hear pertinent issues. The district has a large number of board committees that are sometimes taking action or controlling issues without the consent of the board as a whole. Even though some of the committees have employees or community leaders as members, school board committee members have the ability to control an issue before it gets presented to the entire board for consideration. Replacing standing committees with a Committee of the Whole will allow decisions to be made by the entire board and not just a few board members serving on committees.

Strengthen Controls Over Purchasing

Develop and implement purchasing procedures that include a system of internal controls and specific sanctions for non-compliance. BISD does not have sufficient controls in place to ensure compliance with state purchasing laws. Several breaches of board policy and state law have occurred in 2001 and 2002. For example, in 2001, district staff discovered that BISD's insurance policies were not being bid as required by state law and that the purchase of $1.8 million of insurance coverage in 2001 was not approved by the school board as is required by district policy. As a result of allegations of failures to follow purchasing policies, the district has been investigated for its procurement practices by several entities. By instituting a system of internal controls and sanctions for non-compliance, the district can prevent purchasing irregularities or identify them when they occur so that immediate action can be taken.

Automate the requisition process and streamline the process required for purchase order approval. The district's purchasing process is manual and results in delays in acquiring materials and services. Although the district's software has an automated purchasing feature, it is not being used. Some requisitions require as many as eight approvals before they are processed. By automating the process and revising the approval process, BISD can reduce the amount of time and effort required to process purchase requisitions while still maintaining strict control over the function.

Reorganize the Purchasing Department. The department is overstaffed compared to peer districts and is not appropriately staffed or trained. Job descriptions do not require purchasing certifications and previous job-related experience requirements are inadequate. In addition, department staff are not provided adequate purchasing-related training. By training staff appropriately and reducing excess staff, the department not only can save more than $145,000 annually, but also can improve efficiency and service to all BISD departments.

Reorganize the Management Structure to Focus on Instruction

Rename the position of assistant superintendent for Administrative Services to assistant superintendent for Auxiliary Services and reassign the functional responsibilities of the area superintendents. BISD's area superintendents have responsibilities and assignments that are not compatible with their main goal of providing oversight of the education process at campuses. Individual area superintendents have districtwide responsibilities in addition to their cluster schools such as responsibilities for warehouse, textbooks, fixed assets, Food Services, Transportation, Health Services, Records Management, Athletics, PEIMS and Student Accounting. Some of the area superintendents are responsible for functions which they may not be trained to manage. The proposed reorganization will free area superintendents to focus on their key responsibilities of supporting the schools in their cluster.

Reorganize the division of Curriculum and Instruction by adding a Support Services position and reassigning responsibilities to reflect a more logical grouping of functions. The Curriculum and Instruction administration is not organized effectively to support direction and oversight to educational programs and positions. Many positions and their functions are organized in a manner that impedes the curriculum and instruction processes so important for student achievements. The fragmenting of programs such as counseling, library/media services, health services and special education makes communications and coordination of program efforts difficult. Guidance and counseling, library/media services, health services and special education need better

centralized coordination. By reorganizing the curriculum and instruction functions so that related activities and responsibilities are more closely aligned and adding a support services position, the district can provide better oversight and communications.

Reduce Overstaffing and Increase Personnel Qualifications

Use staffing allocation formulas to determine the number of positions within each department and eliminate excess positions. The number of clerical staff per campus is significantly higher than the industry standard, as is the number of assistant principals at most schools. According to industry standards, the district is overstaffed by 194.5 campus clerical positions and 44.5 assistant principals. The district also has 45 non-campus administrators or higher-level positions that are supported by 76 secretarial positions. By adopting allocation formulas and reducing clerical positions and assistant principals through attrition and reassignment, BISD will save more than $5.2 million annually and more equitably and efficiently distribute staff to each school.

Train security guards to become commissioned peace officers and reorganize the department. The BISD Police and Security Services Department does not staff commissioned peace officers at campuses or during the night shift. Campuses are served with security officers who have limited authority to deal with dangerous situations. In addition, when a school alarm goes off after hours, a patrolling security guard is sent to the school armed with only a pair of handcuffs and a flashlight. Commissioned officers have authority to make arrests if they see a felony or breach of the peace being committed in their presence as well as request and serve warrants for other crimes. By training existing security guards to be commissioned peace officers, the district will provide staff and students better security.

Use custodial staffing formulas to better allocate custodians. Although the district uses staffing formulas, they are not in line with industry standards and are not consistently followed. By adhering to its own district staffing formulas the district can reduce 31 positions through attrition and save $610,762 annually.

Improve the Budget and Operational Processes

Create a chief information officer position that reports directly to the superintendent and consolidate all technology related functions under this position. BISD's technology functions lacks leadership and the organizational structure does not lend itself to efficiency. The Instructional Technology Department reports to the assistant superintendent for Curriculum and Instruction, the Computer Services Department

administrator reports to the Area 3 superintendent while the PEIMS department reports to the Area 2 Superintendent. The divisions among information technology departments lead to unnecessary duplication in procedures between these sections. A chief information officer will provide leadership and consistency for all technology related functions and having this position directly report to the superintendent will ensure high-level support for technology districtwide.

Centralize personnel and human resources functions under a single Human Resources Department and eliminate excess staff. The structure of the Human Resources Department is inefficient and over staffed. The Human Resources functions are separated into two departments, certified and classified personnel. The Certified Personnel Department focuses on teachers, campus and central office administrators and other professional personnel while the Classified Personnel Department's efforts are focused on professional and auxiliary personnel. The Finance Department oversees employee benefits and the Curriculum and Instruction Department oversees professional development activities. In 2001-02, the 41 Human Resources employees supported 6,555.3 full time equivalent (FTE) employees, with a ratio of 159.9 district FTEs per Human Resources Department employee. By reorganizing the department, unifying all human resource functions under a single department, and eliminating excess staff, the district will operate a more efficient human resource operation and save more than $254,000 annually.

Improve the budget process and related reports to ensure adequate information is made available to the board. The board frequently approves deficit budgets without sufficient information to explain the reasons for the deficits. For each of the years from 1997-98 to 2002-03 the district's approved budgets included a deficit spending plan that averaged more than $17 million per year during the six-year period. The 2002-03 budget has a deficit of $26.4 million and neither the budget documents nor staff sufficiently explained what caused the deficit. Improved budget processes and related reports will provide the board with the information needed to better manage the district's financial resources.

Exemplary Programs and Practices

TSPR identified numerous "best practices" in BISD. Through commendations in each chapter, the report highlights BISD's model programs, operations and services provided by BISD administrators, teachers and staff. Other school districts throughout Texas are encouraged to examine these exemplary programs and services to see if they could be adapted to meet their local needs. TSPR's commendations include the following:

BISD has an effective Strategic Planning process that ensures goals and objectives are well developed and monitored BISD develops a five-year Strategic Plan that is used to implement the district's mission, vision, goals and objectives. The plan has seven components including individual plans for community, curriculum, facilities, programs, staff development, staff recruitment and retention and technology. To develop and monitor the Strategic Plan, the district has formed a Strategic Planning team made up of parents, teachers and community members.

The district provides special education personnel and parents of students with disabilities extensive training opportunities. BISD offers its special education staff extensive training opportunities using internal staff, Region 1 personnel and providers on a local, state and national level. As part of BISD's goal to enhance communication and services provided to students, the district also encourages parents to attend local meetings, state conferences and accompany district staff to other districts. BISD pays registration and travel expenses for parents of special education students who attend conferences concerning their children's disabilities.

The Public Information Office uses cable television and radio stations to communicate district information. The district has an instructional television station, KBSD, which runs a bulletin board from 9:00 p.m. to 9:00 a.m. on weekdays and continuously on the weekends. Announcements for the bulletin board are created in the Public Information Office and forwarded to KBSD. If a department or school in the district wants to display information on the television station's bulletin board, the information is sent to the Public Information Office so that it can be included in the station's announcements. BISD also purchases radio spots to further communicate with the community.

BISD's Federal Programs Office staff display a commitment to volunteerism by volunteering one hour per week at one of the district's schools. The Federal Programs grants Federal Programs Office employees leave time each week, to participate in volunteer activities at campuses throughout the district. This allows the employees in the Federal Programs Office to "walk the talk." By volunteering, the employees are able to see first hand what goes on at the parent centers, the level of involvement at each center, as well as what is working and what needs improvement.

The Custodial Department uses a standardized scoring mechanism to periodically evaluate custodial operations at individual schools. BISD uses a custodial inspection process to evaluate and improve custodial performance. Unannounced twice a year, custodial inspections have been in place since 1994-95 and rate the schools against one another. District

administration then uses this scoring mechanism to adjust custodial staffing and processes, as necessary.

BISD has implemented a comprehensive and effective fixed asset management system ensuring accurate accounting of fixed assets.
BISD has a comprehensive and effective fixed asset management program including a detailed procedures manual widely distributed to schools and departments, which contains flowcharts for the procedures to be followed and copies of forms that must be completed. All fixed assets acquired by the district are first transferred to the property control clerk where they are tagged and recorded before being shipped to the school or department. Annual physical inventories are conducted and numerous reports are provided by the system to enable discrepancies to be reconciled. Much of the information contained in the manual is also posted and available on the district's Web site.

BISD has effectively controlled its textbooks losses. The district has taken several steps to control textbook losses including the development of a textbook procedures manual, an automated textbook inventory system to track textbooks by school and by student, procedures to handle the transfer of textbooks between schools, periodic audits of textbooks and an established policy for the collection of funds from parents when books are lost or damaged. Textbook losses in BISD have declined by 18.7 percent since 1996-97.

BISD has used TIF and E-Rate money for technology improvements.
BISD has aggressively pursued grant funding to build its technology infrastructure. The district receives several types of state and federal grants related to technology including the Telecommunications Infrastructure Fund (TIF) grant and a federal E-Rate discount. A federal grant available through the Telecommunications Act of 1996, E-Rate funding offers libraries and K-12 schools discounts of 20 to 90 percent on telecommunications services, Internet access and internal connections. From 1998-99 to 2001-02, the BISD spent more than $13 million in grant funding to build its technology infrastructure and improve the quality of technology equipment in the district.

BISD's Management by Objectives (MBO) committee represents initiatives to improve communication and resolve problems between the Transportation Department's management and staff members.
The MBO is comprised of eight drivers, two monitors, one mechanic, one dispatcher and one administrative employee. The committee meets monthly and has fostered discussions about driver pay rates, salaries and a policy of route choices by seniority.

The Food Services Department has saved the district new construction funds by verifying that equipment is necessary in new cafeteria facilities. The district includes Food Services Department management in its pre-planning stages for construction of new schools. Enrollment projections and the type of school are taken into consideration when determining what type of equipment will be necessary for the department. The Food Services Department estimates that it has saved the district $50,000 per school by eliminating unnecessary equipment in the new facilities.

The Community Youth Development (CYD) program is a proactive district effort to reduce juvenile crime. The CYD program serves approximately 5,000 BISD students, age 17 or younger, and their families, residing in or attending school in a particular zip code area of Brownsville. These students and their families take part in the educational, recreational, after-school programs and leadership skill development activities offered by the program, in an effort to reduce delinquency and youth crimes.

Savings and Investment Requirements

Many TSPR's recommendations would result in savings and increased revenue that the district could use to improve classroom instruction. The savings opportunities identified in this report are conservative and should be considered minimums. Proposed investments of additional funds usually are related to increased efficiencies or savings, or improved productivity and effectiveness.

TSPR recommended 101 ways to save BISD more than $49.1 million in gross savings over a five-year period. Reinvestment opportunities will cost the district more than $8.2 million during the same period. Full implementation of all recommendations in this report could produce net savings of nearly $40.9 million by 2007-08.

Exhibit 3
Summary of Net Savings
TSPR Review of Brownsville Independent School District

Year	Total
2003-04 Initial Annual Net Savings	$7,757,110
2004-05 Additional Annual Net Savings	$8,734,092
2005-06 Additional Annual Net Savings	$9,583,370
2006-07 Additional Annual Net Savings	$9,784,516
2007-08 Additional Annual Net Savings	$9,779,463
One Time Net (Costs) Savings	($8,285,312)
TOTAL SAVINGS PROJECTED FOR 2003-2008	**$40,869,580**

A detailed list of costs and savings by recommendation appears in **Exhibit 4**. The page number for each recommendation is listed in the summary chart for reference purposes. Detailed implementation strategies, timelines and the estimates of fiscal impact follow each recommendation in this report. The implementation section associated with each recommendation highlights the actions necessary to achieve the proposed results. Some items should be implemented immediately, some over the next year or two and some over several years.

TSPR recommends the BISD board ask district administrators to review the recommendations, develop an implementation plan and monitor its progress. As always, TSPR staff is available to help implement proposals.

Exhibit 4
Summary of Costs and Savings by Recommendation

	Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08	Total 5-Year (Costs) or Savings	One Time (Costs) or Savings
	Chapter 1: District Organization and Management							
1	Ensure that all board members understand their roles and responsibilities, and those of district management by developing operating procedures and a self-monitoring system. p. 29	$0	$0	$0	$0	$0	$0	($2,400)
2	Train all school board members and administrative staff on conducting meetings in accordance with Robert's Rules of Order. p. 30	$0	$0	$0	$0	$0	$0	($855)
3	Establish a formal annual appraisal instrument that includes specific performance measures for the superintendent. p. 33	($840)	($840)	$0	$0	$0	($1,680)	$0
4	Eliminate all board committees and establish a Committee of the Whole to hear presentations from staff committees responsible for researching pertinent issues. p. 35	$0	$0	$0	$0	$0	$0	$0
5	Adopt a policy restricting procurement from or contracting with business entities in which a board member has a substantial interest. p. 37	$0	$0	$0	$0	$0	$0	$0
6	Update and consistently enforce district policy BED (LOCAL) regarding the public participation in open board meetings. p. 39	$0	$0	$0	$0	$0	$0	$0
7	Rename the position of assistant superintendent for Administrative Services to assistant superintendent for Auxiliary Services and reassign the functional							

	responsibilities assumed by the area superintendents. p. 44							
8	Clearly define the area superintendents' reporting structure, roles and responsibilities. p. 45	$0	$0	$0	$0	$0	$0	$0
9	Reorganize the division of Curriculum and Instruction by adding a Support Services position and reassigning responsibilities to reflect a more logical grouping of functions. p. 48	($90,607)	($90,607)	($90,607)	($90,607)	($90,607)	($453,035)	$0
	Totals-Chapter 1	**($91,447)**	**($91,447)**	**($90,607)**	**($90,607)**	**($90,607)**	**($454,715)**	**($3,255)**
	Chapter 2: Educational Service Delivery							
10	Conduct effectiveness evaluations of TASP-related programs and include student performance as a measure of success and program change. p. 73	$0	$0	$0	$0	$0	$0	$0
11	Return oversight of the Advanced Academics program to the Curriculum and Instruction Department and hire staff to fill current vacancies. p. 77	$0	$0	$0	$0	$0	$0	$0
12	Ensure all teachers, counselors and principals receive state- and district-required gifted and talented training hours and track annual participation rates. p. 78	$0	$0	$0	$0	$0	$0	$0
13	Develop a gifted and talented program improvement plan and include student AP examination scores in program evaluations. p. 82	$0	$0	$0	$0	$0	$0	$0
14	Implement strategies to increase participation rates and improve student scores on Advanced Placement examinations. p. 85	$0	$0	$0	$0	$0	$0	$0
15	Increase student participation and passing							

	rates for college entrance examinations. p. 87						
16	Create a long-range plan including grant funding and budget reallocations to achieve "acceptable" library collection standards within five years and "exemplary" standards at the conclusion of the plan. p. 92	($78,480)	($78,480)	($78,480)	($78,480)	($78,480)	($392,400)	$0
17	Fully implement the Master Schedule Timeline and create board policy specifying the use of counselor time. p. 101	$0	$0	$0	$0	$0	$0	$0
18	Revise annual admission, review and dismissal meeting attendance requirements and monitor educational diagnosticians overtime expenditures. p. 106	$79,743	$159,486	$159,486	$159,486	$159,486	$717,687	$0
19	Monitor bilingual student pass rates to implement program changes. p. 126	$0	$0	$0	$0	$0	$0	$0
20	Monitor implementation of strategies to reduce number of limited English proficient students in special education and evaluate their effectiveness. p. 128	$0	$0	$0	$0	$0	$0	$0
21	Increase the number of bilingual/English as a Second Language students in districtwide Gifted and Talented programs. p. 130	$0	$0	$0	$0	$0	$0	$0
22	Increase participation of limited English proficient students in career and technology education courses. p. 141	$0	$0	$0	$0	$0	$0	$0
23	Modify student enrollment projections and staff allocation model and ensure timely hiring of career and technology education staff. p. 142	$0	$0	$0	$0	$0	$0	$0
24	Develop and implement strategies to reduce the							

	number of special education students placed in disciplinary alternative education programs. p. 147							
	Totals-Chapter 2	**$1,263**	**$81,006**	**$81,006**	**$81,006**	**$81,006**	**$325,287**	**$0**
	Chapter 3: Human Resources Management							
25	Centralize personnel and human resources functions under a single Human Resources Department and eliminate excess staff. p.156	$254,011	$254,011	$254,011	$254,011	$254,011	$1,270,055	$0
26	Ensure annual written performance appraisals are completed for all employees. p. 159	$0	$0	$0	$0	$0	$0	$0
27	Use staffing allocation formulas to determine the number of positions within each department and eliminate excess positions. p. 167	$5,238,792	$5,238,792	$5,238,792	$5,238,792	$5,238,792	$26,193,960	$0
28	Establish checks and balances to ensure that everyone follows board-approved hiring practices. p. 173	$0	$0	$0	$0	$0	$0	$0
29	Implement procedures to ensure that reference checks are conducted on all new employees. p. 175	$0	$0	$0	$0	$0	$0	$0
30	Create a position for a full-time Employee Assistance Program coordinator. p. 178	($71,694)	($71,694)	($71,694)	($71,694)	($71,694)	($358,470)	$0
	Totals-Chapter 3	**$5,421,109**	**$5,421,109**	**$5,421,109**	**$5,421,109**	**$5,421,109**	**$27,105,545**	**$0**
	Chapter 4: Community Involvement							
31	Use a survey as a means of allowing the district's parents and community members to provide input on the performance of the Public Information Office. p. 189	($1,038)	($1,038)	($1,038)	($1,038)	($1,038)	($5,190)	$0
32	Assign responsibility for coordinating the Adopt-a-School program to the Public Information Office and develop a mechanism for tracking the monetary and							

	in-kind contributions of each business partner in a manner that will more equitably distribute contributions to schools. p. 193							
33	Publish and print the district's newsletter, *News Review*, in both English and Spanish to improve district communications with the 90 percent Hispanic population. p. 199	($20,100)	($20,100)	($20,100)	($20,100)	($20,100)	($100,500)	$0
34	Discontinue production and distribution of the wall and pocket calendars. p. 200	$575	$575	$575	$575	$575	$2,875	$0
35	Contact national non-profit organizations to recruit volunteers and implement volunteer incentive initiatives for the community at no cost to the district to fill gaps in the service delivery. p. 205	$0	$0	$0	$0	$0	$0	$0
36	Adjust the parent education centers' schedules and hours of operation to promote parent participation. p. 208	$0	$0	$0	$0	$0	$0	$0
	Totals-Chapter 4	**($21,456)**	**($21,456)**	**($21,456)**	**($21,456)**	**($21,452)**	**($107,280)**	**$0**
	Chapter 5: Facilities Use and Management							
37	Reorganize Facilities, Maintenance and Custodial Services under the assistant superintendent of Administrative Services. p. 221	$0	$0	$0	$0	$0	$0	$0
38	Conduct a comprehensive facilities analysis and incorporate results into a long-range facilities master plan. p. 223	$0	$0	$0	$0	$0	$0	($802,716)
39	Create a Facilities planner position responsible for long-term planning, building assessments and budget planning. p. 225	($70,683)	($70,683)	($70,683)	($70,683)	($70,683)	($353,415)	$0
40	Develop a structured construction management and monitoring process. p.							

	227						
41	Develop and adopt Architectural/Engineering selection procedures that reinforce selection of the most qualified firms. p. 228	$0	$0	$0	$0	$0	$0	$0
42	Establish appropriate construction contingency levels and manage contingency funds outside of construction contracts. p. 230	$0	$0	$0	$0	$0	$0	$0
43	Develop a checklist of requirements to be completed before contractors are allowed to begin a project. p. 230	$0	$0	$0	$0	$0	$0	$0
44	Develop a preventive maintenance plan to help reduce maintenance costs. p. 233	$0	$83,334	$166,667	$166,667	$166,667	$583,335	($108,000)
45	Develop a plan to upgrade the current work order system to track work orders and preventive maintenance needs by facility, frequency and cost. p. 234	$0	$240,000	$240,000	$240,000	$240,000	$960,000	($80,000)
46	Conduct a cost-benefit analysis for outsourcing portable building construction and HVAC projects. p. 236	$0	$0	$0	$0	$0	$0	$0
47	Centralize all custodial services functions under the custodial/ environmental supervisor. p. 238	$0	$0	$0	$0	$0	$0	$0
48	Apply custodial staffing formulas to staff schools and other facilities with the appropriate number of custodians. p. 241	$610,762	$610,762	$610,762	$610,762	$610,762	$3,053,810	$0
49	Consider using recommendations included in the State Energy Conservation Office report. p. 243	$0	$40,536	$40,536	$40,536	$40,536	$162,144	$0
	Totals-Chapter 5	**$540,079**	**$903,949**	**$987,282**	**$987,282**	**$987,282**	**$4,405,874**	**($990,716)**

Chapter 6: Asset and Risk Management

50	Prepare monthly and annual cash flow forecasts. p.254	$0	$0	$0	$0	$0	$0	$0
51	Ensure compliance with the Public Funds Inves tment Act and related training by designating responsibility in a position's job description. p. 256	$0	$0	$0	$0	$0	$0	$0
52	Centralize the activity fund accounts to improve internal controls. p. 259	$0	$0	$0	$0	$0	$0	$0
53	Implement a light-duty policy for employees. p. 266	$132,157	$132,157	$132,157	$132,157	$132,157	$660,785	$0
54	Maintain a central file of all insurance policies for the district and update the insurance information spreadsheet to reflect premiums and coverages annually. p. 268	$0	$0	$0	$0	$0	$0	$0
55	Implement the blood borne pathogen exposure control plan and conduct annual evaluations of the plan. p. 269	($81,400)	($8,140)	($8,140)	($8,140)	($8,140)	($113,960)	$0
56	Adopt a board policy that defines the value of fixed assets that should be capitalized, establishes the depreciation method that should be used and assigns responsibility for safeguarding fixed assets. p. 276	$0	$0	$0	$0	$0	$0	$0
	Totals-Chapter 6	**$50,757**	**$124,017**	**$124,017**	**$124,017**	**$124,017**	**$546,825**	**$0**
	Chapter 7: Financial Management							
57	Restructure the Budget and Finance Departments, reduce staff and clearly define job titles. p. 292	$188,271	$188,271	$188,271	$188,271	$188,271	$941,355	$0
58	Annually analyze historical expenditures early in the budget process and establish budget targets to increase funding percentages for instructional categories. p. 299	$0	$0	$0	$0	$0	$0	$0
59	Decentralize and automate							

	the district budget process to eliminate duplication of effort and ensure all budget managers are included throughout the process. p. 301							
60	Revise budget documents to include more informative data and develop balanced budgets that provide realistic expectation of revenues and expenditures. p. 305	$0	$0	$0	$0	$0	$0	$0
61	Require the chief financial officer to present budget summaries each month at board meetings and fiscal impact statements for each agenda item. p. 309	$0	$0	$0	$0	$0	$0	$0
62	Establish a general fund balance policy, develop a plan to achieve and maintain a target fund balance and require reports to the board. p. 312	$0	$0	$0	$0	$0	$0	$0
63	Develop a tax collection policy and prepare separate requests for proposals for current and delinquent tax collection services to eliminate conflict of interest. p. 318	$552,792	$952,493	$1,351,105	$1,341,986	$1,336,933	$5,530,309	$0
64	Contract with external auditor to perform a more extensive review of the district's internal controls and financial practices. p. 322	($8,000)	($8,000)	($8,000)	($8,000)	($8,000)	($40,000)	$0
65	Develop a board policy to require the internal auditor to report functionally to the Board of Trustees and administratively to the superintendent. p. 324	$0	$0	$0	$0	$0	$0	$0
66	Revise job descriptions for the internal audit staff to require additional technical proficiency, experience and certifications and fill the Lead Internal Auditor position. p. 326	$0	$0	$0	$0	$0	$0	$0

#	Recommendation							
67	Improve the internal audit plan by incorporating risk assessments and a discussion of overall audit objectives. p. 329	$0	$0	$0	$0	$0	$0	$0
68	Purchase and require all hourly staff to use a districtwide automated timekeeping system. p. 332	$0	$0	$0	$0	$0	$0	($375,000)
69	Develop a comprehensive districtwide financial management procedures manual. p. 334	$0	$0	$0	$0	$0	$0	$0
	Totals-Chapter 7	**$733,063**	**$1,132,764**	**$1,531,376**	**$1,522,257**	**$1,517,204**	**$6,431,664**	**($375,000)**

Chapter 8: Purchasing and Warehousing

#	Recommendation							
70	Develop and implement purchasing procedures that include a system of internal controls and specific sanctions for non-compliance. p. 345	$0	$0	$0	$0	$0	$0	$0
71	Automate the requisition process by implementing existing system capabilities and streamline the process required for purchase order approval. p. 348	$0	$0	$0	$0	$0	$0	$0
72	Reorganize the Purchasing Department by upgrading job descriptions, providing training to staff and reducing excess staff. p. 350	$145,189	$145,189	$145,189	$145,189	$145,189	$725,945	$0
73	Eliminate the district's dry goods leased warehouse by ordering supplies and furniture on a just-in-time basis. p. 360	$27,600	$27,600	$27,600	$27,600	$27,600	$138,000	$0
	Totals-Chapter 8	**$172,789**	**$172,789**	**$172,789**	**$172,789**	**$172,789**	**$863,945**	**$0**

Chapter 9: Computers and Technology

#	Recommendation							
74	Create a chief information officer position that reports directly to the superintendent and consolidate all technology-related functions under this position. p. 374	($3,910)	($3,910)	($3,910)	($3,910)	($3,910)	($19,550)	$0
75	Combine and collapse all existing technology							

	committees to form an interdepartmental Technology Users Steering Committee. p. 377							
76	Upgrade the long-range technology plan and broaden its scope to cover all technology areas. p. 382	$0	$0	$0	$0	$0	$0	$0
77	Update, create and consolidate policies and procedures for all technology-related functions. p. 384	$0	$0	$0	$0	$0	$0	$0
78	Develop and implement a formal methodology for the selection, implementation and integration of an integrated technology information systems. p. 386	$0	$0	$0	$0	$0	$0	$0
79	Create a districtwide disaster recovery plan. p. 389	$0	$0	$0	$0	$0	$0	$0
80	Equitably distribute instructional computers among elementary schools. p. 391	$0	$0	$0	$0	$0	$0	$0
81	Hire a Training Lead Teacher to conduct technology training for schools. p. 392	($56,037)	($56,037)	($56,037)	($56,037)	($56,037)	($280,185)	$0
	Totals-Chapter 9	**($59,947)**	**($59,947)**	**($59,947)**	**($59,947)**	**($59,947)**	**($299,735)**	**$0**
	Chapter 10: Student Transportation							
82	Improve driver turnover by increasing bus driver salaries. p. 409	($149,023)	($149,023)	($149,023)	($149,023)	($149,023)	($745,115)	$0
83	Immediately fill the positions for all unassigned routes and hire a pool of permanent, part-time drivers to manage absenteeism and overtime expenditures. p. 412	$63,524	$63,524	$63,524	$63,524	$63,524	$317,620	$0
84	Develop benchmarks and a methodology for collecting and reporting data for monitoring the department's performance on a regular basis. p. 419	$0	$0	$0	$0	$0	$0	$0

85	Develop a plan to complete implementation and use the preventive maintenance module of the district's vehicle maintenance information system. p. 423	$0	$0	$0	$0	$0	$0	$0
86	Outsource the Transportation Department's parts supply and inventory function to a local private supplier to improve productivity. p. 424	$27,921	$27,921	$27,921	$27,921	$27,921	$139,605	$0
87	Develop and implement a formal school bus replacement policy that includes a plan for rotating buses and is based on the fleet's mileage, age and maintenance records. p. 426	$0	$0	$0	$0	$0	$0	$0
	Totals-Chapter 10	**($57,578)**	**($57,578)**	**($57,578)**	**($57,578)**	**($57,578))**	**($287,890)**	**$0**
	Chapter 11: Food Services							
88	Exclude custodial hours from the MPLH calculation and develop a staffing standard for Food Service custodians. p. 445	$277,701	$277,701	$277,701	$277,701	$277,701	$1,388,505	$0
89	Solicit Food Services management expertise and consider departmental goals and objectives when making key decisions that affect the department. p. 447	$0	$0	$0	$0	$0	$0	$0
90	Prepare a five-year preventative maintenance plan for food service equipment and staff accordingly. p. 449	($44,336)	($44,336)	($44,336)	($44,336)	($44,336)	($221,680)	$0
91	Institute two lunch periods at all high schools. p. 457	$0	$33,039	$63,571	$141,102	$141,102	$378,814	$0
92	Adopt board policy that restricts vending operations and concessions during any of the meal periods. p. 459	$0	$0	$0	$0	$0	$0	$0
93	Expand the Breakfast-in-a-Bag program to every school in the district. p. 460	$271,783	$384,960	$535,707	$648,605	$648,605	$2,489,600	$0
94	Allocate utility costs in Food Service departmental budget. p. 464	$581,220	$581,220	$581,220	$581,220	$581,220	$2,906,100	$0

95	Use the excess fund balance to build the new Food Service facility, including a central kitchen and warehouse to avoid sending funds back to the government. p. 467	$0	$0	$302,316	$302,316	$302,316	$906,948	($3,400,000)
96	Remit the pro-rata share of the exclusive vendor contract to Food Services as stipulated in the contract, document the transfer of funds and amend the language of paragraph 13 to be in compliance with purchasing laws. p. 470	$0	$0	$0	$0	$0	$0	$0
	Totals-Chapter 11	**$1,086,368**	**$1,232,584**	**$1,716,179**	**$1,906,608**	**$1,906,608**	**$7,848,347**	**($3,400,000)**

Chapter 12: Safety and Security

97	Reorganize the BISD Police Department and Security Services and replace some of the security officers with commissioned peace officers. p. 484	($17,890)	($103,698)	($220,800)	($200,964)	($200,964)	($744,319)	$0
98	Annually review and update the BISD Police Department and Security Services procedures manual. p. 488	$0	$0	$0	$0	$0	$0	$0
99	Apply coverage ratios when allocating security personnel and resources to schools. p. 490	$0	$0	$0	$0	$0	$0	$0
100	Ensure the district's hall monitors are being used in an appropriate capacity based on the duties outlined in their job description. p. 491	$0	$0	$0	$0	$0	$0	$0
101	Complete an unannounced security assessment of each campus and develop plans to enforce better physical security measures. p. 494	$0	$0	$0	$0	$0	$0	$0
	Totals-Chapter 12	**($17,890)**	**($103,698)**	**($220,800)**	**($200,964)**	**($200,964)**	**($744,319)**	**$0**
	Total Savings	**$8,388,517**	**$9,378,047**	**$10,343,587**	**$10,524,897**	**$10,519,844**	**$49,154,892**	**$0**
	Total Costs	($631,407)	($643,955)	($760,217)	($740,381)	($740,381)	($3,516,341)	($4,768,971)

	Net Savings (Costs)	$7,757,110	$8,734,092	$9,583,370	$9,784,516	$9,779,463	$45,638,551	($4,768,971)

5 Year Savings	$49,149,892
5 Year Cost	($8,285,312)
Grand Total	$40,869,580

Chapter 1
DISTRICT ORGANIZATION AND MANAGEMENT

This chapter reviews the organization and management of the Brownsville Independent School District (BISD) in the following sections:

A. Governance
B. District Management
C. Planning and Evaluation

The management of a school district requires cooperation between the elected members of the Board of Trustees, the superintendent and the district staff. The board's role is to set the goals and objectives for the district in both instructional and operational areas; determine the policies that will govern the district; approve the plans to implement those policies; and provide the funding necessary to carry out the plans.

The superintendent, as the district's chief executive officer, recommends the appropriate number of staff and resources to operate and accomplish the board's goals and objectives. The superintendent is also responsible for reporting management information to the board, and ensuring that the district is held accountable for meeting its performance goals. District managers and staff manage the day-to-day implementation of the board's plans and policies, and also recommend modifications needed to ensure that the district operates effectively.

BACKGROUND

Brownsville ISD, the state's 18th-largest school district, is located in the City of Brownsville in Cameron County, one of four counties that make up the Rio Grande Valley. With a 2001-02 student enrollment of 42,541 students and 6,555 employees, the district is the region's largest employer.

Brownsville, the state's southernmost city, is located on the U.S./Mexico border, across from Matamoros, Mexico. Brownsville is 25 miles from the Gulf of Mexico and is within minutes of South Padre Island, a popular resort area.

With a population of over 139,000 residents, Brownsville is the region's largest city. It boasts an international seaport, a thriving economy and a 19 percent job-growth rate since the passage eight years ago of the North American Free Trade Agreement (NAFTA) with Mexico. The city also offers a low cost of living and good weather and air quality. *Forbes Magazine* recently named it one of the 10 best places to do business in the U.S. There are now 150 manufacturers on either side of the border.

Despite its robust economy and employment opportunities, Brownsville has a low per-capita income, where more than half of all households earn less than $25,000 per year. While the city boasts several universities and public school systems, nearly half of the adult population does not have a high school education. More than 30 percent of Brownsville's population is foreign-born; nearly 90 percent over age 5 speaks a language other than English; and 42 percent report that they speak limited English. Collectively, these factors present daunting challenges to BISD.

The district serves its students in five high schools, 10 middle schools and 32 elementary schools. Two of the district's elementary schools were opened in August 2001 and one in August 2002. The district also has five alternative campuses: the Alternative Education Center at Josephine Webb Campus, the Teen Learning Center, Lincoln Park School, Juvenile Justice Alternative Education Program and the Deaf Education Program. Also in 2002, the district opened the Margaret M. Clark Aquatic Center, a facility that has an eight-lane, 55-meter swimming pool, built with a portion of the proceeds from a $100 million bond program approved by voters in 1997.

BISD selected five Texas school districts to serve as peer districts for comparative purposes: Corpus Christi, Laredo, North East, Plano and Ysleta ISDs. Demographic data comparing the student populations in these districts is presented in **Exhibit 1-1**.

As shown in **Exhibit 1-1**, BISD's student population is 97.7 percent Hispanic; 0.1 percent are African American; 2 percent are Anglo; and 0.3 percent are classified as Other. Of the total population, 92.8 percent of BISD's students are categorized as economically disadvantaged, while 43.8 percent are identified as limited English proficient. The percentages of economically disadvantaged students and students classified as having limited English proficiency are considerably higher than the state averages in these categories. Statewide, the average percentage of economically disadvantaged students is 50.5 percent, and the average percentage of students with limited English proficiency is 14.5 percent.

Exhibit 1-1
Demographic Characteristics of Students
BISD, Peer Districts and State
2001-02

| District | Student Enrollment | Racial/Ethnic Percent | | | | Economically Disadvantaged | Limited English Proficiency |
		African American	Hispanic	Anglo	Other		
Brownsville	**42,541**	**0.1%**	**97.7%**	**2.0%**	**0.3%**	**92.8%**	**43.8%**

Corpus Christi	39,383	5.6%	71.8%	21.2%	1.4%	56.8%	8.0%
Laredo	23,188	0.1%	99.0%	0.8%	0.1%	96.2%	58.9%
North East	53,030	9.6%	39.5%	48.0%	2.8%	35.0%	3.9%
Plano	98,944	7.7%	10.9%	66.7%	14.8%	10.4%	8.6%
Ysleta	46,742	2.3%	88.8%	8.0%	1.0%	77.9%	24.6%
Region 1	**314,566**	**0.2%**	**95.9%**	**3.5%**	**0.4%**	**84.5%**	**N/A**
State	**4,146,653**	**14.4%**	**41.7%**	**40.9%**	**2.8%**	**50.5%**	**N/A**

Source: Texas Education Agency (TEA), Public Education Information Management System (PEIMS), 2001-02.

Brownsville ISD is located in Regional Education Service Center I (Region 1). The Legislature created 20 regional education service centers in 1967 to provide services such as cooperative purchasing, computer support and training to Texas school districts. Region 1 covers a seven-county area in South Texas.

Chapter 1
DISTRICT ORGANIZATION AND MANAGEMENT

A. GOVERNANCE

Section 11.051 of the Texas Education Code (TEC) mandates an elected board of trustees oversee the management district. District residents elect school board members either at large or from single-member districts.

As a legal agent of the State of Texas, the board derives its legal status from the Texas Constitution and state laws. School boards must operate in accordance with applicable state and federal statutes, regulations interpreting statutes and controlling court decisions. Pursuant to Section 11.151 of the TEC, each board must:

- govern and oversee the management of the public schools of the district;
- adopt such rules, and bylaws as the board may deem proper;
- approve a district developed plan for site-based decision-making and provide for its needs;
- select tax officials, as appropriate to the district's need;
- adopt a budget for the succeeding fiscal year, and file a report of disbursements and receipts for the preceding fiscal year;
- have district fiscal accounts audited at district expense by a Texas certified or public accountant holding a permit from the Texas State Board of Public Accountancy following the close of each fiscal year;
- publish an annual report describing the district's educational performance, including campus performance objectives and the progress of each campus toward those objectives;
- receive bequests and donations or other money coming legally into its hands in the name of the district;
- select depository for district funds;
- order elections, canvass the returns, declare results and issue certificates of election as required by law;
- dispose of property no longer necessary for the operation of the school district;
- acquire and hold real and personal property in the name of the district; and
- hold all powers and duties not specifically delegated by statute to the TEA or the State Board of Education.

BISD's Board of Trustees consists of seven members. Trustees serve three-year terms on a rotating basis. All members are elected at large.

Exhibit 1-2 lists the board members, their titles, term expiration date, years served on the board and respective professions.

Exhibit 1-2
BISD Board of Trustees
2001-02

Board Member	Title	Term Expires	Full Years of Service as of October 2001	Occupation
Herman Otis Powers, Jr.	President	May 2003	5 Years	Financial Services
Pat Lehmann	Vice President	May 2004	1 Year	Self-Employed
Joe Cadriel	Secretary	May 2005	3 Years	Business/Construction
Hugh Emerson, Jr.	Assistant Secretary	May 2003	2 Years	Banker
Joe Colunga	Member	May 2005	7 Years	Assistant Professor
Randy Dunn	Member	May 2004	1 Year	Retired Police Officer
Marilyn del Bosque Gilbert	Member	May 2004	1 Year	Manager - Public Utilities Board

Source: BISD Superintendent's Office, August 2002.

Regular board meetings, which last an average of three hours and 18 minutes, are held on the first and third Tuesdays of each month at 5:30 p.m. in the BISD Board Room located at 1900 Price Road. The public is allowed to comment at the regular meeting, but each individual must adhere to a five-minute time limit. The board calls special meetings as needed.

The superintendent and board president create each meeting's agenda. A board member can request an agenda item by notifying the board president. Any staff member can request an agenda item by notifying the superintendent, who then decides whether to add it to the agenda. The attorney on retainer for the district then receives the agenda. The meeting notice is posted in the administration building 72 hours before the meeting, as required by law.

BISD was in a state of transition during the course of this performance review. On June 6, 2002, the board voted to suspend Superintendent Dr. Noe Sauceda. Although he remains the district's superintendent, pending a hearing before a TEA hearings examiner, for purposes of differentiation the report will refer to him as the former superintendent. The board placed the district under the direction of Interim Superintendent Johnny Pineda in June 2002. Efforts have been made throughout this chapter to separate events and actions attributed to the former superintendent and the interim superintendent.

FINDING

BISD contracts with the Texas Association of School Boards (TASB) to maintain its policies online. Under this agreement, TASB also provides the district with updates to legal policy, which ensures that a district's policies are current in regards to federal and state law, case law, State Board of Education rules and other legal authority affecting the governance of Texas school districts. The district maintains and updates its own local policies. Policies designated by TASB as a legal (LEGAL) policy are designed to comply with various legal requirements. Local policies developed by or for the district to reflect board decisions are designated as local (LOCAL). TASB issues policy updates to help districts keep their basic policies current. All BISD's policies are accessible online through the TASB Web site.

The district has a policy committee that is responsible for ensuring that local policies are kept current.

COMMENDATION

By subscribing to the Texas Association of School Boards' (TASB) "Policy Online" service, BISD ensures its administrators, teachers, parents, students and the community have access to its board policies.

FINDING

By attending board meetings, listening to taped recordings of several board meetings, reviewing board minutes and analyzing district documentation, the review team identified several instances in which individual board members have operated outside of their role as policy makers and have acted as individuals rather than as a board of the whole. Interviews with employees highlight these issues. Employees reported that board members visit them in their offices and question administrative decisions. Board members have even called some BISD employees at home in the evenings, on weekends and during their vacation days.

Individual members of the board have also had direct communication with vendors and employees regarding district business; requested that vendors provide proposals for work directly to board members rather than staff; reversed decisions made by the administration; and obtained district information by requesting data directly from employees rather than the superintendent. Some board members have also dealt directly with administrative matters, leaving appropriate staff members out of the communication loop.

On July 9, 2002, a prospective insurance provider submitted a proposal to provide workers' compensation coverage to the district. The proposal was addressed directly to the school board president. A note attached to the proposal stated that the insurance provider was instructed by the board president to submit the proposal to him rather than to district staff.

In July 2002, individual board members requested a meeting with the district's administrator of the district-owned cable television station, and called him into a meeting while he was on vacation to discuss the purchase of two low-powered television stations for $6 million. One of the stations would serve the Brownsville area and the other would serve the McAllen area, approximately 60 miles from Brownsville. Also during July 2002, the same board members traveled to Dallas to view a demonstration of a similar television station operation. These meetings and actions were initially taken without the consent of the board as a whole. While the interim superintendent approved the Dallas travel request, the assistant superintendent overseeing the cable television station was not informed that these meetings and communications had taken place until after the fact. Board members stated that these meetings were initiated by the former superintendent; however, documentation dated in July 2002 shows that these meetings were initiated after the former superintendent had been suspended by the board.

Documentation indicates that individual board members may be involving themselves with parental complaints and overturning district staff decisions regarding such issues without following proper appeal processes.

The board's direct interaction in the administrative decisions of the district disrupts BISD's daily operations. Moreover, this board interaction serves to undermine the trust between the district staff, the community, students and the board. Some boards have addressed these concerns by developing operating and self-monitoring procedures, with assistance from TASB.

Recommendation 1:

Ensure that all board members understand their roles and responsibilities, and those of district management by developing operating procedures and a self-monitoring system.

To ensure board members fulfill their roles and responsibilities, the board should seek guidance from TASB in developing operating procedures that detail how to handle board issues such as hiring employees, requesting information, appropriate communication between board and staff and procedures for holding executive sessionsand each board member should agree to them. In addition, the board should create a self-monitoring system to ensure that board actions are consistent with agreed-upon operating procedures. When they are not consistent, the board attorney should notify the board of the discrepancies found between the official operating procedures and the board's actual procedures, and the minutes should reflect the board attorney's findings.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board president creates an ad hoc steering committee of board members who will draft board operating procedures that include a self-monitoring system.	March 2003
2.	The superintendent contacts TASB and obtains their assistance in developing operating procedures and a self-monitoring system.	April 2003
3.	The ad hoc steering committee submits the operating procedures, including a monitoring plan, to the full board for input and adoption.	May 2003
4.	The board adopts the proposed procedures, including any appropriate modifications.	June 2003

FISCAL IMPACT

A cost of $2,400 is assumed for this recommendation based on TASB assistance at $250 an hour for 8 hours plus $400 travel ($250/hr. x 8 hr = $2,000 plus $400 = $2,400).

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Ensure that all board members understand their rules and responsibilities, and those of district management by developing operating procedures and a self-monitoring system.	($2,400)	$0	$0	$0	$0

FINDING

BISD board meetings are unorganized and difficult to follow because the board does not consistently adhere to Robert's Rules of Order as required by district policy BE (LOCAL). Robert's Rules of Order is the traditional protocol for parliamentary debate. The purpose of these procedures is to ensure that meetings are conducted fairly and effectively. In addition, these rules set a level playing field, allowing all board members to express their opinions in a respectful and meaningful way. After reviewing board-meeting video and audio tapes and attending two board meetings, the review team found that board members often are out of order, with individual members talking at the same time, reprimanding the superintendent or one another, discussing items that are not posted on the official agenda and ignoring the board attorney's attempts to keep the meeting in order.

On May 17, 2002, for example, the board was deliberating during a Special Called board meeting as to whether to hire a law firm for a specific assignment. One board member made a motion to hire the recommended firm, with another board member seconding the motion. According to Robert's Rules of Order, after a motion has been made and seconded, it can then be discussed by the board.

At this particular meeting, a third board member made an amendment to the motion, stating that because the contract they were considering contained no hourly rates or caps on total fees that could be incurred, he wanted to place some restrictions on the contract. In accordance with Robert's Rules of Order, once a motion has been amended, the proposed amendment must be seconded and may be further amended and discussed. However, during the May 17, 2002 Special Called meeting, after the motion was amended, the board president called for a vote on the original motion, stating that the amendment would only be discussed if the motion failed. The board's attorney was consulted for guidance at this point, and the attorney recommended that the board vote on the original motion, but stated that should he discover subsequently that the vote should have been on the amended motion, he would advise the board at that time.

The issue was finally resolved after the May 17, 2002 executive session. The attorney publicly clarified that there should indeed have been discussion and a vote on the amendment to the motion. However, the board member who originally tried to make the amendment stated that he did not wish to pursue it further.

In several instances, the board has tried to rescind their votes soon after making them. According to Robert's Rules of Order, votes cannot be rescinded if, in the case of a contract, the party to the contract has been informed of the approving vote. On August 24, 2001, for example, a board member requested an agenda item for the purpose of rescinding the

approval of an insurance contract that was approved during the August 21, 2001 board meeting. In another example, the board tried to rescind the award of an employee's contract one week after voting to approve it. In both of these examples, the parties to the contracts had been informed of the decisions.

Board members also engage in discussions regarding items that have not been posted on the agenda. The Texas Open Meetings Act requires that public meeting agendas contain the description of each subject to be discussed at the meeting. Texas courts have interpreted this to mean that the notice must be sufficient to alert the public, in general terms, of the subjects that will be considered in the meeting. During a April 16, 2002 meeting, for example, the board's attorney and the former superintendent made several requests for order because board members repeatedly discussed items not posted on the agenda.

Knowing and following a prescribed set of rules such as Robert's Rules of Order allows all concerns to be heard at public meetings in an orderly and efficient manner and allows for decisions to be made without confusion. Public debate is a healthy way to arrive at decisions, but there must first be a set of "ground rules" in place in order for the debate to be effective.

Recommendation 2:

Train all school board members and administrative staff on conducting meetings in accordance with Robert's Rules of Order.

Each board member should be supplied a copy of Robert's Rules of Order and trained on appropriate implementation of these procedures. One board member could be designated parliamentarian and be responsible for injecting input when the board members are out of order. The superintendent and board secretary should also attend training to become familiar with the rules.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent researches training opportunities for board members on proper board meeting conduct.	March 2003
2.	The superintendent enrolls board members in training and, if necessary, orders training materials.	March 2003
3.	All board members, the superintendent and board secretary participate in the training.	By June 2003
4.	The board conducts meetings in accordance with Robert's Rules of Order.	Ongoing

FISCAL IMPACT

The district can obtain training through Region 1, TASB or on-line. Self-paced training in the use of Robert's Rules of Order is available for $95 per packet. Each packet includes a copy of Robert's Rules of Order, Revised; an activity manual; and a computerized tutorial. The district should order nine copies-seven for the board members and two for the administrative staff, for a total cost of $855 ($95 x 9).

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Train all school board members and administrative staff on conducting meetings in accordance with Robert's Rules of Order.	($855)	$0	$0	$0	$0

FINDING

Although the board has established districtwide goals, it does not set formal goals and objectives specifically for the superintendent, nor is there evidence that the superintendent receives regular, formal evaluations.

Exhibit 1-3 shows the history of the superintendent position and internal management team since 1990. It illustrates that, other than the tenures of Dr. Esperanza Zendejas and Mr. Wallace Jackson, there has been high turnover in the position, resulting in instability in district management.

Exhibit 1-3
BISD Superintendents and Internal Management Team
1990 to Present

Dates	Superintendent
1989-1991	Dr. Jack Ammons
1991-1992	Oscar Barbour, Chief Executive Officer
1992-1995	Dr. Esperanza Zendejas
1995-1996	G. Wallace Jackson, Interim Superintendent
1996-2000	G. Wallace Jackson
2000	Internal Management Team
2000-2001	Hector Gonzales, Interim Superintendent
2001-2002	Dr. Noe Sauceda

2002	Johnny Pineda, Interim Superintendent

The interim superintendent told the review team that the superintendent regularly receives formal evaluations. However, after several requests, the district was not able to locate the superintendent evaluation files; therefore, no analysis of the evaluation process was performed.

In October 2001, the board planned to formally evaluate the superintendent. However, it is unclear as to whether that evaluation actually took place. At least one board member provided their evaluation sheet to the review team, but the district could not provide formal records of the evaluation completed by the board as a whole. In addition, some board members said they felt that they were not adequately prepared to evaluate the superintendent because they had not had adequate time to prepare nor had they received adequate training.

A review of continuing education credits for board members shows that out of the seven board members, only three have attended specialized training in board/superintendent relations or training in how to evaluate superintendents. However, of the three board members attending this training, one attended in 1998-99, 1999-2000 and 2000-01; one member attended training only in 1998-99; and the third member attended training in 2001-02.

The Texas Commissioner of Education has drafted procedures for the appraisal of school superintendents. Although using these procedures is not required of school boards, they are highly recommended by the Commissioner. These procedures are presented in **Exhibit 1-4**. The first step in the evaluation process is to establish goals that define expectations and set priorities for the superintendent.

Exhibit 1-4
Procedures for Appraisal of Superintendent
Recommended by the Commissioner

Note: The following procedures, which are recommended but not required by the commissioner, may be used in whole or in part for the Superintendent's evaluation.

The Board shall establish an annual calendar providing for the following activities, in which both the Board and the Superintendent shall participate:

    1. Procedures for setting goals that define expectations and set priorities for

     the Superintendent.
2. Formative conference.
3. Summative conference.

The Superintendent shall be involved in developing, selecting, or revising the appraisal instrument and process. Student performance shall be a part of locally developed appraisal instruments for Superintendents as specified in Education Code 39.054.

A student performance domain shall be included in the appraisal of the Superintendent as follows: "The Superintendent promotes improvement of the performance of students in the District through activities such as comparing disaggregated student performance results to state accountability standards and to prior year performance."

The domains and descriptors used to evaluate the Superintendent may also include:

1. Instructional management.
2. School or organization morale.
3. School or organization improvement.
4. Personnel management.
5. Management of administrative, fiscal, and facilities functions.
6. Student management.
7. School or community relations.
8. Professional growth and development.
9. Academic excellence indicators and campus performance objectives.
10. Board relations.

In developing the appraisal instrument, the Board shall use the Superintendent's job description as applicable.

The Board may implement a process for collecting staff input for evaluating the Superintendent. If such a process is implemented for use in the Superintendent's evaluation, staff input shall not be anonymous.

Before conducting the Superintendent's appraisal, Board members shall have evidence of training in appropriate personnel evaluation skills related to the locally established criteria and process.

The District, with the approval of the Board, may select the commissioner-recommended student performance domain for Superintendents or may develop an alternative process in consultation with the District- and campus-level committees and adopted by the Board. If the District uses the commissioner-recommended student performance domain, it shall meet the following

requirements:

1. The Superintendent shall be required to attend an orientation approved by the commissioner;
2. The results on the commissioner-recommended student performance domain shall be incorporated into the local appraisal instrument;
3. The results on the commissioner-recommended student performance domain shall be a primary consideration of the Board in evaluating the Superintendent;
4. For a Superintendent new to the District, the results from the commissioner-recommended student performance domain shall be on a "report only" basis during the first year. Dropout and attendance data for the Superintendent shall be on a "report only" basis for the first two years.

Source: Texas Administrative Code, Title 19 §150.1021 and §150.1022.

Section 21.354 of the TEC requires administrators to be evaluated annually. Furthermore, funds of a school district may not be used to pay an administrator who has not been appraised in the preceding 15 months.

Since the interim superintendent has been in charge of the district, board members and administrators have reported that any animosity that might have once been present is now gone. However, without an objective system in place to ensure that the board and the district administrators are in agreement as to what is expected of the superintendent, performance evaluations may be subjective; based on emotion rather than actual performance.

Recommendation 3:

Establish a formal annual appraisal instrument that includes specific performance measures for the supe rintendent.

The board should adopt a formal appraisal format to assist the superintendent in the performance of his or her job duties. The district should consider adopting the Commissioner of Education's recommended Procedures for Appraisal of Superintendent.

Specific goals and performance measures should be included, such as a requirement for a balanced budget, targets for a fund balance, the percent of operating expenditures spent on instruction and progress in student test scores, to name a few. There also may be some expectations that the superintendent conduct more staff communication and work to improve employee morale as measured by a survey of staff. Whatever criteria is used, the expectations must be set in advance so that the superintendent

has an opportunity to make adjustments and address the issues and concerns of the board.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent includes an agenda item for the adoption of the Commissioner of Education's Appraisal of Superintendent guidelines.	March 2003
2.	The board approves the adoption.	April 2003
3.	The superintendent and the board attend joint training on evaluation and communication strategies.	June 2003
4.	The board uses the guidelines to establish annual goals for the superintendent.	June 2003
5.	Board members and the superintendent use a facilitator to assist in developing an appraisal instrument.	September 2003 and Ongoing
6.	Board members use an appraisal instrument to assess the need for additional training.	September 2003 and Annually

FISCAL IMPACT

The cost of a facilitator to assist the board and superintendent to establish an appraisal instrument will be $840 annually based on 12 hours of facilitation (12 hours x $70 per hour = $840). The board may wish to use the help of the facilitator for the first evaluation cycle, but should be able to maintain the process each year thereafter once a system is established.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Establish a formal annual appraisal instrument that includes specific performance measures for the superintendent.	($840)	($840)	$0	$0	$0

FINDING

The district has a large number of board committees that are sometimes taking action or controlling issues without the consent of the board as a whole.

Exhibit 1-5 shows a list of board committees and the number of times they have met from 2000-01 through 2002-03. All board committees are staffed with three board members and meetings are posted so that in the

event that a non-committee board member attends, the district will be in compliance with the Texas Open Meetings Act.

Exhibit 1-5
BISD's Board Committee Meetings
2000-01 through 2002-03

Committee	Number of Meetings 2000-01	Number of Meetings 2001-02	Number of Meetings 2002-03
Internal Audit	0	0	0
Budget	6	5	0
Curriculum	5	5	0
Facilities	6	10	2
Insurance	5	8	1
Policy	2	6	0
Technology	3	1	0
Litigation	0	1	0
Legal Search	0	1	0
Safety	0	1	0
Finance	0	1	0

Source: List of Committee Meetings, 2001 through September 12, 2002, BISD's Superintendent's Office.

The Finance Committee met one time during 2001-02; however, there is no Finance Committee listed in the district's list of committees. In addition, some of the committees have joint meetings. In 2001-02, the Facilities and Policy Committees met jointly on October 9, 2001 and the Policy and Curriculum Committees met together on April 18, 2002.The Internal Audit Committee did not meet during 2000-01 through 2002-03 and the Litigation and Safety Committees have met only once each during this time period.

Although the Insurance Committee has met on several occasions, there has been no positive direction from the committee on how the district should proceed in dealing with the insurance issues it faces. In February 2002, the former board president replaced the Insurance Committee chair without formally informing the chair. This was the source of several public

arguments among board members. During the March 19, 2002 board meeting, the administration presented a recommendation to the board to procure property and casualty insurance. The board took considerable time discussing the proposed insurance contract, and ultimately decided to temporarily disband the Insurance Committee. To assist in researching and selecting employee health insurance, the current board president appointed an ad hoc committee made up of seven district employees and two local physicians. At the September 10, 2002 board meeting, this committee presented its recommendation for employee health insurance to the board. However, the chief financial officer and the interim superintendent were not included in the evaluation process.

TEC Section 11.061 authorizes school boards to create committees to facilitate their operations. The creation of committees is detailed in the district's Board Policy BDB (LEGAL) and BDB (LOCAL). Such board committees should comply with the state's Open Meetings Act. BISD board policy stipulates that board committees must be advisory in nature, serving as fact-finding groups to make recommendations to the board as a whole.

Committees can serve as work sessions for board members and the superintendent's cabinet. Appropriately configured committees allow the board to interact openly with the superintendent and administrative team. Accordingly, questions about administrative and operational issues and their effect on school district policy can be discussed in considerable detail and resolved by committees without prolonging regular board meetings. The superintendent and cabinet can also use the committees to help train board members in the details of district finance, budgeting, curriculum development and other critical district functions.

Some districts are effectively using other methods to meet their governance structure. For example, the Houston Independent School District (HISD) uses a Committee of the Whole, rather than permanent board committees or standing committees to interact with the district's administration as well as to become knowledgeable about district operations. In a Committee of the Whole meeting, board members review all agenda action items with the administration, allowing each board member to ask questions before the regular board meeting. The superintendent and supporting administrative staff provide any necessary documentation to the board. Committees of the Whole function in a similar fashion as workshops.

Recommendation 4:

Eliminate all board committees and establish a Committee of the Whole to hear presentations from staff committees responsible for researching pertinent issues.

The board should rely on staff to investigate and research issues and then have them report back to the entire board with their findings. For decisions or inquiries requiring detailed analyses such as insurance, facilities or technology issues, the board can request that the superintendent form ad hoc staff committees to report findings and data to the Committee of the Whole. A Committee of the Whole can meet during work sessions as needed so that valuable board meeting time is not used to discuss detailed issues.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board president directs the superintendent to prepare a board action item abolishing all board committees.	March 2003
2.	The board president directs the superintendent to prepare a board action item to establish a Committee of the Whole.	March 2003
3.	The superintendent prepares the items and they are voted on by the board.	April 2003
4.	The board requests that the superintendent provide names of individuals to serve on ad hoc committees as the need arises.	Ongoing
5.	Ad hoc committees present their findings to the Committee of the Whole.	Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

Board members may not be consistently adhering to conflict of interest policies as prescribed by district policy and state law. District policy BBFA (LEGAL) establishes procedures to be followed when board members have a substantial interest in a business. According to this policy, the board may contract with a busine ss entity in which a board member has a substantial interest if the board member follows the disclosure and abstention procedures spelled out in the policy.

The Texas Local Government Code Section 171.004(a) requires local public officials with a substantial interest in a business entity or real property to file affidavits stating the nature and extent of the interest

before a vote or decision on any matter concerning the business entity or real property, and to abstain from voting on the matter.

Section 171.002 defines a substantial interest in a business entity and a substantial interest in real property. A substantial interest in a business entity is defined as a person owning 10 percent or more of the voting stock or shares of the entity or 10 percent or more or $15,000 or more of the entity's fair market value, or if funds received by the person from the business entity exceed 10 percent of his or her gross income for the previous year. This section also says that a person has a substantial interest in real property if the interest is an equitable or legal ownership with a fair market value of $2,500 or more and that a local public official is considered to have a substantial interest under this section if a person closely related to the official has a substantial interest.

Board policy BBFA (LEGAL) states that board members should disclose relationships that involve any of the following:

- ten percent or more ownership of the voting stock or shares of an entity;
- ten percent or more ownership of the fair market value of an entity;
- ownership of $15,000 or more of the fair market value of an entity;
- funds from the business entity exceed 10 percent of gross income for the previous year; or
- real property is involved and the board member has equitable or legal ownership with a fair market value of at least $2,500.

On two separate occasions, the board has voted to acquire land on which to build new schools. In each of these transactions, a real estate firm who is associated with a current board member was used to handle the sales transactions. **Exhibit 1-6** summarizes the events that took place in the purchase of land.

Exhibit 1-6
BISD Land Transactions

Date	Event	Transaction Amount	Real Estate Commission Amount
October 2, 2001	Board votes to acquire 37 acres of land at a cost of $17,000 per acre or $629,000		
October 19, 2001	Land transaction is funded	$629,000	$18,870
December 18, 2001	Board votes to acquire 21.76		

	acres of land at $21,000 per acre or $456,960		
March 11, 2002	Land transaction is funded	$456,960	$27,418
Total		**$1,085,960**	**$46,288**

Source: Board minutes from October 2 and December 18, 2001, settlement statements dated October 19, 2001 and March 11, 2002.

Even after multiple requests by the administration and the board's former attorney, the school board member did not submit an affidavit prior to the board vote. Following the board votes on October 2, 2001 and December 18, 2001, the board member disclosed that he was sponsored by the real estate firm handling the sales transaction. A real estate agent must be sponsored by a real estate brokerage firm that is responsible for all real estate activity performed by the real estate agent. On December 21, 2001, the board member submitted a letter detailing his affiliation with the real estate firm. A review of board minutes shows the board member voted in favor of the land purchase during the October 2, 2001 vote, and after repeated requests from administration, abstained from voting for the land purchase during the December 18, 2001 board meeting. His abstention from the second vote does not change the fact that the relationship existed and should have been disclosed prior to the vote.

In another example, a board member is a licensed insurance agent with a company that provides health care insurance to the district. The board member has not submitted an affidavit, and a review of board minutes reveal that he did not abstain from a vote to enter into a contract with the insurer on September 10, 2002, when the board voted to award a $26 million contract to the insurer for the district's new self-funded health insurance program.

Even with a policy requiring a board member to abstain from voting, the appearance of a conflict of interest may occur. Some members of the public expressed concern about board members doing business with related entities. Whether the allegations are founded or not, there are some perceptions in the community that some board members may be making biased business decisions for the district.

Recommendation 5:

Adopt a policy restricting procurement from or contracting with business entities in which a board member has a substantial interest.

This voluntary declaration by the board would send a clear message to the community that the board does not wish to allow even a perception of wrongdoing to continue.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent and board invite the public to comment on potential concerns with the conflict of interest policy.	April 2003
2.	The superintendent obtains information from other school districts about their conflict of interest policies.	May 2003
3.	The superintendent presents other districts' policies to the board.	June 2003
4.	The board consults legal counsel regarding a revised conflict of interest policy.	July 2003
5.	The board considers and adopts a conflict of interest policy that restricts or eliminates contracting with, or making purchases from, a business entity in which a board member has a substantial interest.	August 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

A review of taped board meetings shows that school board members are not consistently following established polices for public participation during open board meetings. Board policy BED (LOCAL) requires members of the public wishing to address the board to sign up to speak by the time the board meeting begins, usually 5:30 p.m. In addition, the policy states that no speaker shall exceed a five-minute time limit, and that the board president will strictly enforce this policy. Although not in the form of a written policy, the board does not allow members of the public to mention individuals by name in their public comments. Speakers who do mention individual names are not allowed to proceed.

Board members who sign up to speak as private citizens during the public input session of open board meetings do not always follow local policy BED. Although policy states that anyone wishing to participate in the open forum session of a board meeting must sign up by the start of the meeting, board members themselves do not sign up by the deadline. The district responded that these practices do not deviate from board policy because they have been standing practices in the conduct of board meetings. The board members wishing to address the board during public participation

choose to speak last so that other members of the public do not feel intimidated when a board member's name appears on the sign-in sheet.

In one example, during the April 16, 2002 board meeting, a current board member who had not signed up to speak prior to the deadline attempted to address the board during a public input session. The trustee then requested that the board president allow him to exceed the five-minute time limit. Other board members opposed this action, stating that the policies should apply to everyone equally, including board members. On the advice of the board's attorney, the board member attempting to address the board declined to proceed. The board president stated that the board member could discuss his points during the closed meeting of the board, but as the board's attorney advised, this is also not allowed under board policy because no topics may be discussed without first being posted on the agenda. Minutes from the April 16, 2002 board meeting state that in accordance with BISD policy, the board member "was not permitted to comment during Public Forum since he did not signup within the timeline."

It is clear from listening to tapes of board meetings that there is some disagreement over the practice of board members speaking as private citizens during the public input session without adhering to district policy. Also, not all the rules for speaking to the board, such as the prohibition against using individual's names, are contained in policy. The absence of clearly defined rules for public and board member participation during the public input portion of the board meeting could lead to a perception that individuals are not treated fairly.

Recommendation 6:

Update and consistently enforce district policy BED (LOCAL) regarding public participation in open board meetings.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent prepares a proposed amendment to BED (LOCAL) for board members to consider that includes clarification of all rules governing public and board member input during the public input portion of the board meeting.	March 2003
2.	The superintendent submits the item to the board for review and approval.	April 2003
3.	Once the policy is adjusted to provide additional guidance, the board reviews and votes to adopt the policy.	May 2003
4.	The board's attorney enforces the policy.	Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 1
DISTRICT ORGANIZATION AND MANAGEMENT

B. DISTRICT MANAGEMENT

While a district's Board of Trustees sets policy, the superintendent is responsible for carrying out that policy and managing the district in the most effective and efficient manner possible. The goal of administration should always be to facilitate and support the instruction of students by ensuring that every possible dollar and resource is directed to the classroom. As specified by Section 11.201 of the TEC, the superintendent is responsible for:

- planning, operation, supervision and evaluation of the educational programs, services and facilities of the district assigning and evaluating all district personnel;
- terminating or suspending staff members or the non-renewal of staff members' term contracts;
- day-to-day management of district operations;
- preparing district budgets;
- preparing policy recommendations for the board and implementing adopted policies;
- developing appropriate administrative regulations to implement board policies;
- providing leadership in improving student performance; and
- organizing the district's central administration.

The management of BISD has been in fluctuation since the turnover in the superintendent position in 2000 following the TEA investigation into board travel expenditures. After the departure of the superintendent in 2000, the district was managed by an administrative management team followed by an interim superintendent. The board then hired Dr. Noe Sauceda, former superintendent of Edgewood ISD, in June 2001 to fill the superintendent position. Almost one year after Dr. Sauceda was hired by the district, he was placed on administrative leave pending an investigation. In September 2002, the board voted to terminate the superintendent. The former superintendent is appealing this decision and will present his case to a TEA administrative hearings examiner in the coming months.

Since June 2002, BISD has operated under the leadership of Interim Superintendent Johnny Pineda. The staffing structure that supports the interim superintendent was put into place in July 2002 and is depicted in **Exhibit 1-7**.

Exhibit 1-7
BISD's Organizational Structure
2002

Source: BISD Superintendent's Office, August 2002.

The district is organized vertically with five area superintendents overseeing schools that are clustered into feeder systems. All the elementary schools in Area 1, for example, feed into the same middle schools and high school. During the reorganization in July 2002, an assistant superintendent for Operations position was eliminated on a temporary basis and many duties of the assistant superintendent of Administrative Services were distributed among the area superintendents.

The area superintendent for Human Resources is responsible for the day-to-day management of the district's personnel-related issues, including issues with certified personnel and classified personnel. The district has a position of chief financial officer that is responsible for budget, insurance, finance, investments, payroll and purchasing. The assistant superintendent for Curriculum and Instruction handles all curriculum functions including federal and state programs, bilingual education, guidance and counseling services, career and technology programs and adult continuing education. The assistant superintendent for Administrative Services is responsible for managing the district's cable television operations and the mailroom. All area superintendents report to the assistant superintendent for Curriculum and Instruction. The area superintendents oversee several schools in their

assigned feeder patterns, a large responsibility for which they are directly qualified.

In addition to the two assistant superintendents and the area superintendent for Human Resources reporting to the interim superintendent, the Facilities, Maintenance, Security, Public Information Office and Internal Auditing Department also report directly to the interim superintendent. Legal and accounting services are provided to the district through contractual arrangements with local firms.

The BISD board has a board secretary position that is responsible for assisting board members with their administrative needs.

FINDING

BISD maintains a process that effectively controls expenditures for legal services. **Exhibit 1-8** shows the legal expenditures in the district for the past five years. Although legal services expenditures have increased over the six-year period, they have not increased significantly. The reason for the increases in 2000-01 and 2001-02 over the 1997-98 amount can be attributed to numerous lawsuits filed against the district because of mold found in two of its schools.

Exhibit 1-8
BISD Expenditures for Legal Services
1997-98 through 2001-02

| Year	Expenditure Amount	Percent Increase/(Decrease) from Prior Year
1997-98	$324,106	N/A
1998-99	$365,749	12.8%
1999-2000	$294,057	(19.6)%
2000-01	$416,653	41.7%
2001-02	$369,019	(11.4)%
Percent Increase 1997-98 through 2001-02		**13.9%**

Source: TEA, PEIMS reports for object code 6211 - Legal Services dated 1997-98 through 2000-01. Amount for 2001-02 from BISD general ledger report for object code 6211 - Legal Services dated 9/1/01 through 8/31/02.

Exhibit 1-9 presents BISD's legal services expenditures for the period of 1997-98 through 2001-02, in total and on a per pupil basis.

Exhibit 1-9
BISD Expenditures for Legal Services
Total and Per Pupil
1997-98 through 2001-02
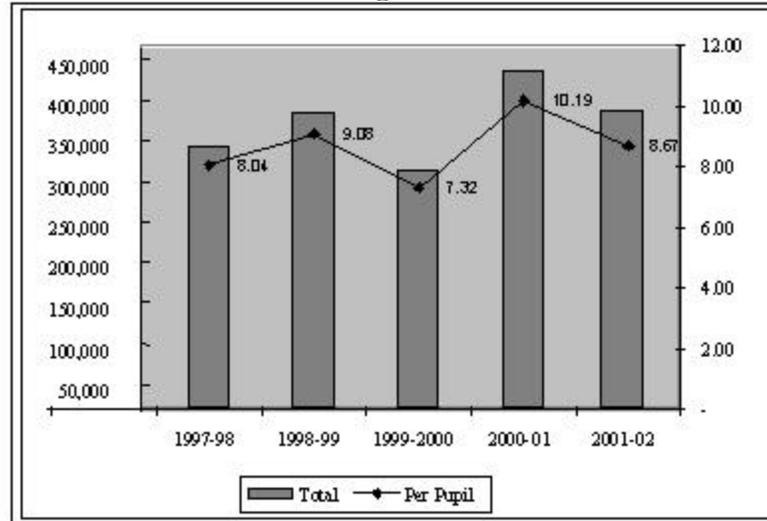
Source: TEA, PEIMS reports for object code 6211 - Legal Services dated 1997-98 through 2000-01. Amount for 2001-02 from BISD general ledger report for object code 6211 - Legal Services dated 9/1/01 through 8/31/02.

Exhibit 1-10 shows a comparison of BISD's legal fees to those of its peer districts. The chart illustrates that BISD rates favorably among its peers in the amount expended per pupil for legal services. BISD, Corpus Christi ISD and Plano ISD all have relatively reasonable per pupil expenditures for legal services. In addition, BISD's legal expenditures are lower than the overall state average of $11.07 per student.

Exhibit 1-10
BISD and Peer District
Per Pupil Expenditures for Legal Services

2000-01
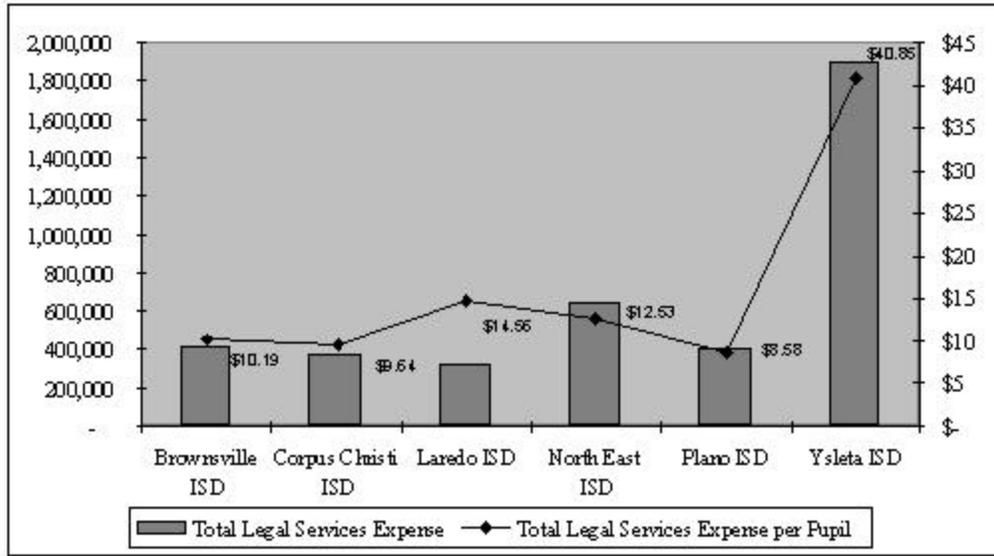
Source: TEA, PEIMS, 2000-01.

The review team obtained a copy of the contract for legal services for the board's attorney. The contract specifies that the attorney will be compensated at a rate of $115 per hour, and that the attorney will report hours incurred to date on a weekly basis to the superintendent's office. Should the attorney anticipate more than 130 hours will be incurred for any given month, according to the contract, special permission must be granted by the superintendent's office.

The superintendent's office closely monitors legal bills and notifies the attorney if it does not receive a weekly report.

This process has allowed the district to obtain professional legal representation while controlling the amount expended on legal fees.

COMMENDATION

BISD effectively monitors and controls its legal services expenditures.

FINDING

In July 2002, BISD's area superintendents were assigned responsibilities that are very diverse and not compatible with their main goal of providing oversight of the education process at campuses. The interim superintendent stated this was done because the position of assistant superintendent for Operations was temporarily eliminated in a cost-cutting measure. For instance, the area superintendent for Area 3 is not only responsible for the 11 schools in that area's cluster, but is also responsible

for the functions of Food Services, Health Services, Advanced Academics and Computer Services, functions that are all very dissimilar. Likewise, the area superintendent for Area 4 is responsible for the Athletics Department, Aquatics Center, Transportation Department, preparing school board agendas and coordinating the district's strategic plan, all in addition to the day-to-day management of the nine schools in the Area 4 cluster. **Exhibit 1-11** lists each area superintendent and shows their respective responsibilities.

Exhibit 1-11
BISD Area Superintendents' Responsibilities

Area 1 Superintendent	Area 2 Superintendent	Area 3 Superintendent	Area 4 Superintendent	Area 5 Superintendent
Hanna High School	Lopez High School	Pace High School	Porter High School	Rivera High School
Oliveira Middle School	Besteiro Middle School	Central Middle School	Cummings Middle School	Alternative Education Center
Vela Middle School	Aiken Elementary	Stell Middle School	Faulk Middle School	Lincoln Park School
Burns Elementary	Del Castillo Elementary	Benavides Elementary	Canales Elementary	Teen Learning Community
Egly Elementary	Garza Elementary	Clearwater Elementary	Castaneda Elementary	Lucio Middle School
Gallegos Elementary	Morningside Elementary	Garden Park Elementary	Longoria Elementary	Perkins Middle School
Hudson Elementary	Palm Grove Elementary	Martin Elementary	Resaca Elementary	Garcia Middle School
Perez Elementary	Southmost Elementary	Putegnat Elementary	Sharp Elementary	Champion Elementary
Paredes Elementary	*Records Management**	Russell Elementary	Victoria Heights Elementary	El Jardin Elementary
Yturria Elementary	*Admissions and Attendance Office**	Skinner Elementary	*Athletics**	Gonzalez Elementary
*Special Services**	*PEIMS/Student Accounting**	Villa Nueva Elementary	*Aquatics Center**	Vermillion Elementary
	Warehouse/Textbooks/	*Food Services**	*Transportation**	

	Fixed Assets*			
		Health Services*	Board Agendas*	
		Computer Services*	District Strategic Plan*	
		Advanced Academics*		

Source: BISD organization chart, July 2002.
* Responsibilities other than cluster schools assigned as of July 2002.

Only one area superintendent, Area 5, does not have assigned duties other than the schools in that cluster. All other area superintendents have significant additional responsibilities.

This organizational structure presents a problem for the district since the area superintendents' span of control over dissimilar functions does not allow them to devote adequate attention to all the functions assigned to them.

Some of the area superintendents are responsible for functions that they may not be trained to manage. Several of the area superintendents interviewed by the review team stated that they were in the process of "educating" themselves on their additional responsibilities. The interim superintendent responded that this organizational structure was put in place in an effort to do more with less. He added that evidence indicates that the children of the district have not suffered as the schools have continued to receive local and state recognition. However, this organizational shift is relatively new, taking effect only in July 2002.

Just as was done in BISD prior to July 2002, many school districts place the auxiliary functions of the district, such as food service operations, transportation and facilities under the supervision of an assistant superintendent who has a background in providing support to these types of functions.

Recommendation 7:

Rename the position of assistant superintendent for Administrative Services to assistant superintendent for Auxiliary Services and reassign the functional responsibilities assumed by the area superintendents.

The position of assistant superintendent for Administrative Services should be renamed as the assistant superintendent for Auxiliary Services. This new position will be responsible for the functions of Food Services, Transportation, Facilities, Maintenance, Athletics, Aquatics Center, KDSB and Mail Room operations. The Warehouse operations, which include Textbooks and Fixed Assets, should be moved to report to the chief financial officer. The records management function should be housed in the Public Information Office.

This proposed reorganization will help to alleviate the extra duties placed on the area superintendents, allowing them to focus on their responsibilities of supporting the schools in their cluster.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent develops an organizational structure that will help facilitate the achievement of district goals.	March 2003
2.	The superintendent presents the structure to the board for approval.	April 2003
3.	The superintendent implements the organizational structure.	April 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

BISD area superintendents assumed considerably more responsibilities in July 2002 that diverted their attention from curriculum matters in some cases. The five area superintendents do not have a specific list of responsibilities related to the district's development and management of curriculum and budgets. As a result, the schools being supported by each area superintendent are receiving different levels of service based on the skills and experience of the individual holding the area superintendent position.

A review of the job description for the area superintendent position and interviews with both central administration staff and campus staff reveals that the area superintendent position, while having many responsibilities, has very little authority. For example, although the area superintendent must sign off on all purchase requests initiated by each campus, area superintendents do not have budget authority. In addition, area superintendents do not have the authority to make curriculum decisions.

Furthermore, interviews with the area superintendents and with campus administrators indicate that a significant role of the area superintendent is acting as a liaison between the central office and campuses when campuses encounter problems with purchasing or personnel issues. For example, one area superintendent told the review team that a significant amount of their time is spent dealing with the Purchasing Department to ensure that campus purchase requests flow through the purchasing system. This is partially a result of the extra duties placed on the area superintendents in July 2002, but other issues also contribute to this. Interviews with each of the area superintendents revealed that they each have a different view of what are their job responsibilities. One area superintendent reported to the review team that they work very closely with the dean of instruction on each campus, and they see this as one of their major responsibilities. However, another area superintendent believes that they should not have any interaction with the campus dean of instruction, since this is a primary role of the principal.

The job description for the area superintendent position states, in part, the following:

> **RESPONSIBILITY**: the role of the Area Superintendent is to provide administrative expertise and leadership, and act as primary liaison among assigned administrators, central staff support services, department administrators and cluster schools, assist in Staff Development Programs, ensure that assigned programs remain in compliance programmatically and financially, maintain a concentrated goal for improving the quality and effectiveness of the educational programs in the district, and perform other duties as assigned by the Superintendent of Schools.

Another area of misunderstanding is the reporting structure. Some area superintendents said that since July 2002, they report directly to the interim superintendent, while others said that they report to the interim superintendent through the assistant superintendent for Curriculum and Instruction.

Recommendation 8:

Clearly define the area superintendents' reporting structure, roles and responsibilities.

The superintendent should first define and communicate the reporting structure for the area superintendents and then meet with the five area superintendents and the assistant superintendent for Curriculum and Instruction to discuss and develop the roles of each in the district's

curriculum development and delivery. Goals and objectives should be developed for the area superintendents and the assistant superintendent for Curriculum and Instruction. The area superintendents, the assistant superintendent for Curriculum and Instruction and the superintendent should meet monthly to ensure that all schools in the district are consistently working towards the same goals and objectives. Area superintendents should also be involved in all educational program evaluation processes across the district.

The superintendent should also meet with the area superintendents and the chief financial officer to discuss and develop specific roles and responsibilities for the area superintendents in the district's budget development and management processes. The area superintendents should have a role in planning and approving how resources are allocated to schools. They should also be given responsibilities and authority to monitor and manage the budgets of the schools within their cluster.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent defines and communicates the reporting structure for the district's five area superintendents.	April 2003
2.	The superintendent meets with the area superintendents and the assistant superintendent for Curriculum and Instruction and develops curriculum-related responsibilities and authority for the area superintendents.	May 2003
3.	The superintendent meets with the area superintendents and the chief financial officer and develops specific budget-related responsibilities and authority for the area superintendents.	May 2003
4.	The superintendent and the area superintendent for Human Resources develop new job descriptions for the area superintendents.	June 2003
5.	The superintendent and the assistant superintendent for Curriculum and Instruction hold meetings with the area superintendents on a monthly basis.	July 2003 and Monthly Thereafter

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

BISD's Curriculum and Instruction administration is not organized effectively to support direction and oversight to educational programs and

positions. The district has reorganized the department whenever administration changes have occurred.

Currently, Bilingual/ESL education administrative staff, report to the Bilingual/ESL Administrator but other programs heavily impacted by federal legislation/guidelines do not. Similarly, the administrators of Advanced Academics and the Brownsville Urban Systemic Program (BUSP), funded through the National Science Foundation, supervise personnel whose responsibilities, in part, are to work with subject area teachers in instructional delivery and professional development efforts. However, Advanced Academics reports directly to an area superintendent, instructional specialists, guidance and counseling directly report to the PK-12 curriculum administrator and the BUSP project staff directly reports to the assistant superintendent for Curriculum and Instruction. In addition, Library/Media Services report to the Special Programs Administrator and Health Services report to area 3 Superintendent. Staff said that the fragmenting of programs with similar functions makes communication and coordination of program efforts difficult.

Between September 1998 and July 2002, some reorganization of central office functions has occurred on nine documented occasions with subsequent clarification or modification to the restructuring occurring at least three times **(Exhibit 1-12)**.

Exhibit 1-12
Changes to BISD Central Office Organization by
New Organizational Charts or Subsequent Modification by Memo

Date	Reorganization Effective	Organization Modified Further by Memo
September 1998	X	
August 1999	X	
November 1999	X	
March 2000	X*	
June 2001	X	August 2001
August 2001	X	
March 2002	X	March 2002
June 2001	X	
July 2002	X	July 2002

In most of the reorganizations, major changes to functions relating to curriculum and instruction occurred. **Exhibit 1-13** indicates changes resulting from three reorganizations.

Exhibit 1-13
BISD Reorganization Plans
September 1998, July 2000 and July 2002

Function	Selected Reorganization Plan		
	September 1998	**July 2000**	**July 2002**
Schools	Area Superintendents	Area Superintendents	Area Superintendents
Staff Development	Area Superintendent 1	Area Superintendent 1	*Asst. Superintendent of C and I*
Elem Curriculum	Area Superintendent 1	*Districtwide Administrator for C and I*	Not Listed
Sec Curriculum	Area Superintendent 1	*Districtwide Administrator for C and I*	Not Listed
Curriculum Specialists	Area Superintendent 1	*Not Listed*	*PK-12 Curriculum Administrator*
Reading	Area Superintendent 1	*Not Listed*	Not Listed
Assessment, Research and Evaluation	Area Superintendent 2	*Superintendent*	Assistant Superintendent of C and I
Health Services	Area Superintendent 2	*Districtwide Administrator for Operations*	*Area Superintendent 3*
Federal Programs	Area Superintendent 3	*Districtwide Administrator for C and I*	*Special Programs Administrator*

Career and Technology	Area Superintendent 3	*Districtwide Administrator for C and I*	*Special Programs Administrator*
Adult Continuing Education	Area Superintendent 3	*Districtwide Administrator for Operations*	*Special Programs Administrator*
Alternative Education Center	Area Superintendent 3	*Area Superintendent 5*	Area Superintendent 5
Lincoln Park School	Area Superintendent 3	*Area Superintendent 5*	Area Superintendent 5
Teen Learning Community	Area Superintendent 3	*Area Superintendent 5*	Area Superintendent 5
Guidance and Counseling	Area Superintendent 4	*Districtwide Administrator for Operations*	*PK-12 Curriculum Administrator*
Media Services	Area Superintendent 4	*Districtwide Administrator for C and I*	*Special Programs Administrator*
Library Services	Area Superintendent 4		
Advanced Academic Services	Area Superintendent 5	*Districtwide Administrator for C and I*	*Area Superintendent 3*
Instructional Technology	Area Superintendent 5	*Districtwide Administrator for C and I*	*Special Programs Administrator*
Music/Fine Arts	Area Superintendent 5	*Districtwide Administrator for C and I*	*Special Programs Administrator*
Special Services	Area Superintendent 6	*Districtwide Administrator for C and I*	*Area Superintendent 1*
Dyslexia	Area Superintendent 6	*Not Listed*	
UIL/State Competitions	Area Superintendent 6	*Districtwide Administrator for C and I*	*Special Programs Administrator*
Bilingual	Not Listed	*Districtwide*	*PK-12 Curriculum*

Education		*Administrator for C and I*	*Administrator*
Migrant Education	Not Listed	*Districtwide Administrator for C and I*	*Special Programs Administrator*
Grants	Not Listed	*Area Superintendent 5*	*Assistant Superintendent of C and I*
National Science Foundation	*Not Listed*	Not Listed	*Assistant Superintendent of C and I*

Source: BISD, Organization Charts.
"Italics" indicates a change in supervisory responsibility from previously listed organizational chart.

Area superintendents have been assigned non-instructional functions although the majority of the responsibilities listed in their corresponding job descriptions are related to improving curriculum and instruction, planning staff development and directing and monitoring staff performance.

Many districts limit oversight of non-instructional efforts by program administrators in Curriculum and Instruction Departments by delegating those duties to a separate supervisor and subsequently align similar programs and reporting relationships to further streamline communication and productivity.

Recommendation 9:

Reorganize the division of Curriculum and Instruction by adding a Support Services position and reassigning responsibilities to reflect a more logical grouping of functions.

Specific recommendations regarding organization of the division of Curriculum and Instruction are as follows:

- Create a position for a Support Services administrator and assign the functions of guidance and counseling, library/media services, health services and special education to that office;
- Reassign the Special Programs administrator to the office responsible for bilingual/ESL education;

- Reassign the PreK-12 administrator to the office responsible for music/fine arts, Advanced Academics, BUSP, grants and state competitions/UIL; and
- Reassign the office of Assessment, Research and Evaluation to the superintendent's office.

The district should adopt the organizational chart as recommended on **Exhibit 1-14**.

Exhibit 1-14
Recommended Organizational Structure
Division of Instruction
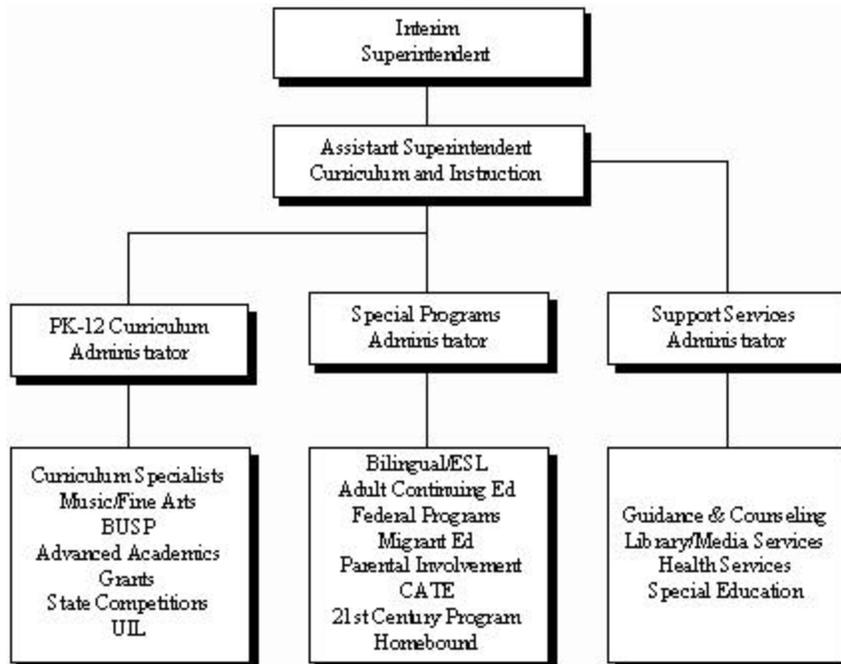
Source: Gibson Consulting Group, Inc., 2002.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent reviews the proposed plan with the assistant superintendent for Curriculum and Instruction and other appropriate staff.	March 2003
2.	The superintendent submits the plan for the proposed new position to the board for approval and inclusion in the budget.	April 2003
3.	The superintendent gives authorization to the area superintendent for Human Resources to advertise the position.	May 2003
4.	The superintendent appoints a committee to review applications and recommend three to five finalists to be interviewed by the	July 2003

	assistant superintendent of Curriculum and Instruction.	
5.	The assistant superintendent of Curriculum and Instruction interviews the finalists and recommends an individual to the superintendent.	August 2003
6.	The selected applicant begins work at the district.	September 2003

FISCAL IMPACT

This fiscal impact of adding a Support Services Administrator is based on the average salary for a pay grade 6 position ($69,143 minimum + $86,434 maximum / 2 = $77,789) + variable benefits of 12 percent ($77,789 x .12 = $9,335) + $3,483 in fixed costs for an annual total of $90,607 ($77,789 + $9,335 + $3,483). It is assumed that all furniture and equipment needs can be met from those currently available in the district.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Reorganize the division of Curriculum and Instruction by adding a Support Services position and reassigning responsibilities to reflect a more logical grouping of functions.	($90,607)	($90,607)	($90,607)	($90,607)	($90,607)

Chapter 1
DISTRICT ORGANIZATION AND MANAGEMENT

C. PLANNING AND EVALUATION

Planning is essential to effective school district management. Proper planning establishes a mission and identifies goals and objectives, sets priorities, identifies ways to complete the mission and determines performance measures and benchmarks to achieve goals and objectives. In its purest sense, planning anticipates the effect of decisions, indicates the possible financial consequences of alternatives, focuses on educational programs and methods of support and links student achievement to the cost of education.

Section 11.251 of the TEC requires boards of trustees of Texas school districts to ensure that district improvement plans and campus improvement plans are developed, reviewed and revised annually. The goals of the plans should be for the purpose of improving the performance of all students in the district.

FINDING

BISD has a well-designed process for developing its strategic or long-range improvement plan. The district appointed a Strategic Planning Team in 1992 composed of district personnel and business and community representatives. Each team member invited other constituents of the district to attend scheduled meetings in order to secure as much broad-based input into the process as possible. Action Team leaders and members were selected to review and make recommendations for the development of an action plan or plans in seven areas: community; curriculum; facilities; programs; staff development; staff recruitment and retention; and technology. In some areas, a single sub-committee developed more than one action plan. The action team working on "community," for example, developed five action plans: increase parental involvement, increase BISD employees' participation, increase private sector and community support, increase two-way communication between the district and its various constituencies and increase shared decision-making. Nine sub-committees were established for the curriculum area: advanced academics, career and technology, language arts, library services, mathematics, physical education and health, science, social studies and special education.

Each action plan contains objectives that are cross-referenced to state and local goals as well as goals developed by other entities such as the U.S. Office of Education and national associations. Each objective is delineated

by a list of appropriate activities, person(s) responsible for each activity, resources needed, dates for initiation and completion of the activities, how the activities will be evaluated and other relevant information such as references or sources and the rate or schedule for implementation.

Updates are made to the Strategic Plan at varying times during the year. Central office instructional facilitators report twice annually on progress made in their areas of responsibility. The district's Records Management Officer compiles the information from those reports as well as data and information from other sources within the district. Brief statements for each of the action steps in the strategic plan are prepared and provided to the Strategic Plan Steering Committee for consideration. Upon its review and approval, an "implementation update" document is prepared and distributed to appropriate staff and strategic plan committee members. Selected statements from the *Strategic Plan 1999-2003* dated October 1999 and implementation updates of October 2001 and March 2002 are provided in **Exhibit 1-15**.

Exhibit 1-15
October 1999 Strategic Plan Activity Statements and
October 2001 and March 2002 Implementation Update Statements

Strategy Statement: Curriculum. We will develop, implement, and evaluate curriculum and instructional strategies to perpetually challenge all students.		
Specific Objective: Advanced Academics. Develop, implement, monitor and revise educational opportunities which demonstrate skills in self directed learning, thinking, research and communication that reflect individuality and creativity at an advanced level through innovative products and performances.		
October 1999 Strategic Plan Activity Statement	**October 2001 Implementation Update Statement**	**March 2002 Implementation Update Statement**
Nomination of all Kindergarten students for screening for the Gifted and Talented Academic (GALAXY) Program (1.1).	Kindergarten teachers and elementary counselors began implementing during the spring 2001.	Kindergarten teachers and elementary counselors began implementing during the spring 2001.
Develop, implement, and revise pre-AP/AP vertical teams, vertical team guides, and training to aid in implementation of advanced curriculum (1.12).	We are revising guides this year.	We are revising guides this year.
Increase the number of	Students are receiving	Students are receiving

students pursuing the research/project options of the Distinguished Achievement Program (DAP) by implementing internship programs at all high schools (1.17).	DAP credit through advanced courses instead of internship programs.	DAP credit through advanced courses instead of internship programs.

Specific Objective: <u>Career and Technology</u>. All BISD students will develop career concentration majors aligned with Career and Technology coherent sequences which lead to high skills careers and/or occupational focuses.

October 1999 Strategic Plan Activity Statement	October 2001 Implementation Update Statement	March 2002 Implementation Update Statement
Restructure Career Guidance and Counseling Services to include 6th-12th grades (2.3).	All Career Placement Officers are operating at 100% of implementation plan.	Full development at the middle schools has not been completed.
Develop, implement and access competency based instruction tasks, activities and assessment to meet TEKS objectives that are validated by business and industry (2.6).	Approximately 60% of the teachers have made a complete validated objective.	Approximately 60% of the teachers have made a complete validated objective.
Incorporate BISD core competencies into each grade level/subject area curriculum and instruction (3.2).	No statement.	No statement.
Implement a plan to communicate curriculum objectives, instructional strategies, and student progress to parents and community (3.3).	No statement.	No statement.
Evaluate the district's instructional programs (3.5).	Annual program evaluations are on schedule. 2000-2001 evaluations were reported to the board on 10/01/01.	Annual program evaluations are on schedule. 2000-0-2001 evaluations were reported to the board on 10/01/01.

Efforts have begun for revisions to the document for the five-year period beginning in 2004-05 and ending in 2008-09.

COMMENDATION

BISD has a well-designed process for strategic plan development that includes appropriate community and staff representatives, and has developed effective procedures for monitoring progress in attaining plan objectives.

Chapter 2
EDUCATIONAL SERVICE DELIVERY

This chapter reviews the Brownsville Independent School District's (BISD) educational service delivery in the following sections:

A. Student Performance and Instructional Delivery
B. Gifted and Talented Education
C. Library/Media Services
D. Health Services
E. Guidance and Counseling
F. Special Education
G. State Compensatory Education/Title I
H. Bilingual Education/English as a Second Language
I. Career and Technology Education
J. Dropout Prevention/Alternative Education

To meet its students' needs, a school district must have a well-designed and well-managed process for directing instruction, maintaining its curriculum, evaluating and monitoring the success of its educational programs and providing the resources needed to support them.

BACKGROUND

The Texas Education Agency (TEA) annually provides comprehensive information on the Texas Assessment of Academic Skills (TAAS) results as well as other demographic, staffing and financial data to school districts and the public through its Academic Excellence Indicator System (AEIS) and its Public Education Information System (PEIMS). This chapter uses the latest available 2001-02 data.

BISD selected five Texas school districts to serve as peer districts for comparative purposes: Corpus Christi, Laredo, North East, Plano and Ysleta. Matched up to its peers, BISD is one of two districts with the lowest percent of African American students, the second lowest percent of Anglo and Other students, and the second highest percentage of Hispanic students. The percentages of African American, Anglo and Other students are lower than those in the Regional Education Service Center I (Region 1) and the state, while the percentage of economically disadvantaged and Hispanic students is the second highest compared to its peers, and higher than the average in Region 1 and the state (**Exhibit 2-1**).

Exhibit 2-1
Demographic Characteristics of Students

BISD, Peer Districts, Region 1 and the State
2001-02

| District | Student Enrollment | Racial/Ethnic Percent | | | | Economically Disadvantaged |
		African American	Hispanic	Anglo	Other	
Brownsville	**42,541**	**0.1%**	**97.6%**	**2.0%**	**0.3%**	**92.8%**
Corpus Christi	39,383	5.6%	71.7%	21.2%	1.4%	56.8%
Laredo	23,188	0.1%	99.1%	0.8%	0.1%	96.2%
North East	53,030	9.6%	39.6%	48.0%	2.9%	35.0%
Plano	48,944	7.7%	10.8%	66.7%	14.7%	10.4%
Ysleta	46,742	2.3%	88.7%	8.0%	0.9%	77.9%
Region 1	**314,566**	**0.2%**	**95.9%**	**3.5%**	**0.4%**	**84.4%**
State	**4,146,653**	**14.4%**	**41.7%**	**40.9%**	**3.1%**	**50.5%**

Source: Texas Education Agency (TEA), Academic Excellence Indicator System (AEIS), 2001-02.
Note: Totals may not add to 100 percent due to rounding.

During 2001-02, BISD employed 6,555 total personnel, including 2,912 teachers, 144 campus administrators, 45 central office administrators, 545 professional support employees, 816 educational aides and 2,093 auxiliary personnelor full-time non-educational staff such as maintenance or food service employees. As indicated in **Exhibit 2-2**, the percent of BISD total staff represented by teachers, professional support personnel, central and campus administrators is lower than the state average. BISD's percentages of educational aides and auxiliary staff are higher than the state average in those two categories.

Exhibit 2-2
Staff Information
BISD and State Totals
1996-97 and 2001-02

Category	BISD	State

	1996-97	2001-02	Percent Change 1996-97 through 2001-02	1996-97	2001-02	Percent Change 1996-97 through 2001-02
Staff						
Teachers	44.9%	44.4%	(0.5%)	51.9%	50.5%	(1.4%)
Professional Support	7.4%	8.3%	0.9%	6.7%	8.9%	2.2%
Campus Administration	2.0%	2.2%	0.2%	2.5%	2.7%	0.2%
Central Administration	0.3%	0.7%	0.4%	0.9%	1.0%	0.1%
Educational Aides	13.7%	12.5%	(1.2%)	9.0%	10.3%	1.3%
Auxiliary Staff	31.7%	31.9%	0.2%	29.1%	26.5%	(2.6%)
Teachers by Race/Ethnicity						
African American	0.3%	0.2%	(0.1%)	8.2%	8.9%	0.7%
Hispanic	74.3%	81.3%	7.0%	15.5%	17.6%	2.1%
Anglo	24.6%	18.1%	(6.5%)	75.6%	72.5%	(3.1%)
Other	0.8%	0.4%	(0.4%)	0.8%	1.0%	0.2%

Source: TEA, AEIS, 1996-97 and 2001-02.
Note: Totals may not add to 100 percent due to rounding.

BISD's share of beginning teachers is 8.1 percent-the highest among its peers-which is higher than the state average (7.8 percent) but lower than the Region 1 average (8.8 percent). Forty-eight percent of BISD's teachers have 11 or more years of experience, making it the third highest percentage among its peers and higher than that in Region 1 and the state (**Exhibit 2-3**).

Exhibit 2-3
Percent of Teachers by Years of Experience
BISD, Peer Districts, Region 1 and the State
2001-02

District	Beginning	1-5 Years	6-10 Years	11-20 Years	20+ Years	11+ Years' Experience

Brownsville	8.1%	24.8%	19.1%	29.0%	19.0%	48.0%
Corpus Christi	3.8%	19.6%	16.2%	31.2%	29.2%	60.4%
Laredo	5.3%	25.8%	17.0%	23.9%	28.0%	51.9%
North East	4.2%	26.4%	21.5%	25.6%	22.3%	47.9%
Plano	6.8%	35.7%	18.2%	20.5%	18.7%	39.2%
Ysleta	7.1%	28.8%	17.8%	24.7%	21.6%	46.3%
Region 1	**8.8%**	**27.1%**	**18.9%**	**25.3%**	**19.9%**	**45.2%**
State	**7.8%**	**27.8%**	**18.1%**	**24.7%**	**21.6%**	**46.3%**

Source: TEA, AEIS, 2001-02.

Compared to its peers, BISD's share of teachers without a degree is the second lowest, which is lower than the percentage in Region 1 and the state, and its share of teachers with a masters or doctorate degree is the second lowest, which is lower than state but higher than Region 1 (**Exhibit 2-4**).

Exhibit 2-4
Degree Status of Teachers
BISD, Peer Districts, Region 1 and the State
2001-02

District	Percent with Degree				
	No Degree	**Bachelors**	**Masters**	**Doctorate**	**Masters and Doctorate**
Brownsville	**0.6%**	**83.0%**	**16.0%**	**0.3%**	**16.3%**
Corpus Christi	1.0%	54.2%	44.3%	0.5%	44.8%
Laredo	5.7%	78.9%	15.4%	0.1%	15.5%
North East	0.3%	64.2%	35.0%	0.6%	35.6%
Plano	1.0%	58.3%	40.1%	0.5%	40.6%
Ysleta	2.2%	75.5%	22.1%	0.2%	22.3%
Region 1	**3.5%**	**82.1%**	**14.3%**	**0.1%**	**14.4%**
State	**1.4%**	**75.3%**	**22.8%**	**0.5%**	**23.3%**

Source: TEA, AEIS, 2001-02.

Exhibit 2-5 compares the percent of students that are economically disadvantaged with the percent of students that pass the TAAS within BISD, its peer districts, Region 1 and the state. Among peer districts, the districts with the highest percent of students passing all TAAS tests have the lowest percent of economically disadvantaged students. The percent of BISD students that are economically disadvantaged is the second highest among its peer districts and is higher than the average for Region 1 and the state. BISD's percent of students passing TAAS is the second lowest among its peer districts and is lowerthan the Region 1 and state averages.

Exhibit 2-5
Percentages of Economically Disadvantaged Students and
Percentages of All Students Passing TAAS
BISD, Peer Districts, Region 1 and the State
2001-02

District	Percent Economically Disadvantaged Students	Rank by Percent Economically Disadvantaged Students	Percent of Students Passing TAAS 2001-02	Rank by Performance
Laredo	96.2%	1	74.4%	6
Brownsville	**92.8%**	**2**	**78.6%**	**5**
Ysleta	77.9%	3	86.3%	3
Corpus Christi	56.8%	4	82.5%	4
North East	35.0%	5	90.4%	2
Plano	10.4%	6	93.9%	1
Region 1	**84.4%**	**N/A**	**81.2%**	**N/A**
State	**50.5%**	**N/A**	**85.3%**	**N/A**

Source: TEA, AEIS, 2001-02.

AEIS also provides information regarding the percent of students enrolled in various programs including regular education, bilingual education and English as a Second Language (ESL), career and technology education (CATE), gifted and talented education (G/T) and special education. Comparatively, BISD has the third lowest percentage of students enrolled in special education programs (11.6 percent), the second lowest percentage of students enrolled in G/T (5.4 percent), the second highest percentage enrolled in bilingual/ESL programs (39.5 percent) and the third lowest percentage enrolled in CATE programs (16.2 percent). The percent

of BISD students enrolled in each of the four programs was lower than the percent in the state. The student enrollment percentage for both G/T and CATE are also lower than the Region 1 percentages.

(**Exhibit 2-6**). The percent of BISD students enrolled in the bilingual/ESL program is the second highest among its peers, and higher than the percentages for both Region 1 and the state.

Exhibit 2-6
Percent of Student Enrollment by Program
BISD, Peer Districts, Region 1 and the State
2001-02

District	Special Education	Gifted and Talented	Bilingual /ESL	Career and Technology
Brownsville	**11.6%**	**5.4%**	**39.5%**	**16.2%**
Corpus Christi	14.7%	4.2%	7.1%	20.4%
Laredo	13.8%	8.6%	58.6%	15.6%
North East	16.4%	6.8%	3.3%	21.5%
Plano	10.9%	9.4%	7.0%	27.9%
Ysleta	11.3%	7.4%	22.2%	11.2%
Region 1	**10.2%**	**8.6%**	**35.6%**	**19.3%**
State	**11.7%**	**8.2%**	**13.1%**	**19.3%**

Source: TEA, AEIS, 2001-02.

The percent of BISD teachers assigned to bilingual/ESL education is highest among its peer districts and is higher than the percent for both Region 1 and the state. The share of BISD teachers assigned to G/T and CATE education is the second highest of its peers, and is higher than the state's percentages in both programs but lower than the percentages for Region 1 in both programs. The percent of BISD teachers assigned to regular education is the second lowest among its peer districts and lower than the percentages for both Region 1 and the state (**Exhibit 2-7**).

Exhibit 2-7
Percent of Teachers by Program
BISD, Peer Districts, Region 1 and the State
2001-02

District	Regular	Comp.	Special	Gifted	Bilingual	Career and	Other

	Education	Education	Education	and Talented	/ESL	Technology	
Brownsville	**50.8%**	**1.2%**	**10.3%**	**4.1%**	**28.0%**	**4.3%**	**1.2%**
Corpus Christi	75.5%	2.8%	10.7%	1.1%	0.0%	4.8%	5.2%
Laredo	49.2%	1.2%	11.5%	7.0%	24.2%	4.2%	2.7%
North East	71.7%	1.1%	16.0%	1.7%	1.7%	4.1%	3.7%
Plano	73.2%	2.8%	14.4%	1.0%	4.0%	2.7%	2.0%
Ysleta	68.3%	0.2%	9.4%	0.1%	17.3%	3.1%	1.6%
Region 1	**55.7%**	**1.7%**	**8.7%**	**4.9%**	**22.9%**	**4.5%**	**1.6%**
State	**70.3%**	**3.1%**	**10.0%**	**2.3%**	**7.8%**	**4.2%**	**2.3%**

Source: TEA, AEIS, 2001-02.
Note: Totals may not add to 100 percent due to rounding.

In 2001-02, BISD's total budgeted instructional operating expenditures per student, compared to its peer districts, were third highest. Categorically, BISD's budgeted instructional operating expenditures per student were second highest in regular education, career and technology education and compensatory education. BISD also ranked the third highest in bilingual/ESL education, the fourth highest in special education and the lowest in G/T education (**Exhibit 2-8**).

Exhibit 2-8
Budgeted Instructional Operating Expenditures
BISD, Peer Districts, Region 1 and the State
2001-02

		Percent of Budgeted Instructional Operating Expenditures**					
District	**Total Instructional Operating Expenditures* per Student**	**Regular Education**	**Gifted and Talented**	**Special Education**	**Career and Technology Education**	**Bilingual /ESL**	**Comp. Education**
Brownsville	**$3,708**	**73.9%**	**0.1%**	**12.9%**	**4.1%**	**2.2%**	**6.9%**
Corpus Christi	$3,530	78.2%	0.3%	12.8%	4.0%	0.2%	4.4%
Laredo	$3,484	70.4%	0.4%	12.3%	4.1%	3.2%	9.6%

North East	$3,991	71.8%	1.2%	18.8%	4.4%	0.5%	3.3%
Plano	$4,160	69.8%	1.3%	17.5%	3.2%	4.8%	3.4%
Ysleta	$3,399	73.9%	0.2%	15.2%	3.4%	1.0%	6.3%
Region 1	**$3,524**	**70.0%**	**1.6%**	**10.1%**	**4.4%**	**5.2%**	**8.8%**
State	**$3,611**	**70.9%**	**1.8%**	**12.6%**	**4.1%**	**4.3%**	**6.4%**

Source: TEA, AEIS, 2001-02.
*Instruction (Functions 11, 95) and Instructional Leadership (Function 21).
**Functions 11 and 95 only.

Chapter 2
EDUCATIONAL SERVICE DELIVERY

A. STUDENT PERFORMANCE AND INSTRUCTIONAL DELIVERY (PART 1)

School districts need reliable systems for managing the instructional process. Administrators must ensure that the resources allocated to instructional programs produce continual improvements in student performance. This effort should include monitoring and evaluating personnel and programs, and it should involve maintaining a comprehensive program that evaluates student achievement across all content areas and grades.

Prior to 2002-03, TAAS was used to measure student performance. Districts administered TAAS in reading and mathematics in grades 3 through 8 and grade 10; in reading and mathematics in Spanish in grades 3 and 4; in writing in grades 4, 8 and 10; and in science and social studies in grade 8. Districts also administered end-of-course (EOC) examinations in Algebra I, Biology, English II and U.S. History. Previously, to graduate from high school in Texas, a student had to pass the TAAS exit-level exam he or she took in grade 10. Beginning in 2002-03, the Texas Assessment of Knowledge and Skills (TAKS) will replace the TAAS and will be administered in grades 9, 10 and 11. Students will take the reading and mathematics tests in grade 9, and in grade 11 they will take the exit-level exam, which includes science, social studies, English language arts and mathematics. Districts will also administer a TAKS science test in grade 5.

Passing rates on TAAS for BISD students rose from 1997-98 through 2001-02 on all three of the TAAS sub-tests, as well as on all tests combined. The percent of students that passed the reading portion of TAAS rose from 77.8 percent to 86 percent. In mathematics, the percent of students that passed increased from 78.6 percent in 1997-98 to 90.1 percent in 2001-02. The passing rate on the writing portion increased from 83.1 percent in 1997-98 to 84.1 percent in 2001-02. The percent of BISD students that passed all tests rose from 67.8 percent to 78.6 percent. BISD's passing rates in all areas in 2001-02, however, were lower than the passing rates of districts statewide, and, consequently, the district's overall rating from TEA fell from *Recognized* in 2000-01 to *Academically Acceptable in 2001-02*. **Exhibit 2-9** shows BISD and state passing rates on TAAS reading, mathematics, writing and all tests for 1997-98 through 2001-02.

Exhibit 2-9
BISD Passing Rates: Texas Assessment of Academic Skills
Reading, Mathematics, Writing and All Tests
1997-98 through 2001-02

Year	Reading		Mathematics		Writing		All Tests	
	BISD	**State**	**BISD**	**State**	**BISD**	**State**	**BISD**	**State**
1997-98	73.1%	83.3%	73.9%	80.4%	80.4%	84.2%	62.4%	73.1%
1998-99	78.4%	86.5%	83.1%	85.7%	82.8%	88.2%	70.2%	78.3%
1999-2000	79.2%	87.4%	83.3%	87.4%	83.5%	88.2%	71.2%	79.9%
2000-01	81.7%	88.9%	87.0%	90.2%	86.0%	87.9%	74.8%	82.1%
2001-02	86.0%	91.3%	90.1%	92.7%	84.1%	88.7%	78.6%	85.3%

Source: TEA, AEIS, 1997-98 through 2001-02.

The percent of BISD students passing each of the three TAAS sub-tests
and all tests combined was the second or third lowest among the peer
districts. It was also lower than the percentages in Region 1 and the state
by 1.6 to 5.3 percentage points on the reading sub-test, 1.2 to 1.6 points on
the mathematics sub-test, 1.9 to 4.6 points on the writing sub-test, and 2.6
to 6.7 points on all tests combined (**Exhibit 2-10**).

Exhibit 2-10
2001-02 TAAS Pass Rates
Reading, Mathematics, Writing and All Tests
BISD, Peer Districts, Region 1 and the State

District	Reading	Mathematics	Writing	All Tests
Brownsville	**86.0%**	**90.1%**	**84.1%**	**78.6%**
Corpus Christi	90.3%	89.9%	88.5%	82.5%
Laredo	82.6%	86.6%	82.9%	74.4%
North East	95.4%	95.4%	91.6%	90.4%
Plano	97.0%	97.0%	95.0%	93.9%
Ysleta	90.9%	94.5%	90.2%	86.3%
Region 1	**87.6%**	**91.3%**	**86.0%**	**81.2%**
State	**91.3%**	**92.7%**	**88.7%**	**85.3%**

Source: TEA, AEIS, 2001-02.

Student TAAS performance is the primary factor in determining district and school accountability ratings. Accountability standards for 2001-02 include four ratings for districts (*Exemplary, Recognized, Academically Acceptable and Academically Unacceptable*) and four ratings for schools (*Exemplary, Recognized, Acceptable* and *Low Performing*). For a school to receive an *Exemplary* rating, at least 90 percent of all students and 90 percent of each student group (African American, Hispanic, Anglo and economically disadvantaged) must pass all TAAS sub-tests (reading, writing and mathematics), the annual dropout rate cannot exceed one percent. To receive a rating of *Recognized* or *Acceptable*, the passing rates must be at least 80 percent and 50 percent, respectively, and an annual dropout rate cannot be greater than 3 percent to receive the *Recognized* rating or greater than 5.5 percent to be rated as *Acceptable*. A school receives a rating of *Low Performing* if less than 50 percent of all students or any of the four student groups passes any of the subject area tests or if the dropout rate exceeds 5.5 percent.

Schools are not rated if they do not serve students within grades 1 through 12, such as pre-kindergarten centers, or if a school has no official enrollment, such as certain magnet schools where students are reported through their sending or "parent" school. Additionally, schools that have applied to TEA and are identified as alternative education programs (AEP) are evaluated under alternative education (AE) procedures resulting in one of three ratings including *AE: Acceptable*, *AE: needs peer review* or *AE: not rated*.

Since 1998-99, there has been improvement in the accountability ratings of individual BISD schools, even though the district's rating slipped from *Recognized* in 2000-01 to *Academically Acceptable* in 2001-02. The number of schools with an *Acceptable* rating fell from 23 to 17, the number of schools given an *Exemplary* rating increased from two to 14 and the number of *Recognized* schools decreased from 17 to 15. In fact, between 1998-99 and 2001-02, the number of *Exemplary* schools in BISD increased from 4.7 percent to 29.8 percent (**Exhibit 2-11**). During this four-year period, there were no *Low performing* schools in the district. In 2001-02, all five BISD high schools received a *Recognized* or *Exemplary* rating.

Exhibit 2-11
Accountability Ratings for
BISD Schools by Grades Served
1998-99 through 2001-02

Name of School	Grades Served	Accountability Rating			
		1998-99	1999-2000	2000-01	2001-02

School	Grades				
Hanna High School	9-12	*Recognized*	*Recognized*	***Exemplary***	*Recognized*
Lopez High School	9-12	*Recognized*	*Recognized*	*Recognized*	*Recognized*
Porter High School	9-12	*Recognized*	*Recognized*	*Recognized*	*Recognized*
Pace High School	9-12	*Recognized*	*Recognized*	***Exemplary***	***Exemplary***
Rivera High School	9-12	*Recognized*	*Recognized*	*Recognized*	*Recognized*
Lincoln Park School	6-12	AE: Acceptable	AE: Acceptable	AE: Acceptable	AE: Acceptable
Raul Besteiro Junior Middle School	6-8	Acceptable	Acceptable	Acceptable	Acceptable
Central Middle School	6-8	Acceptable	Acceptable	Acceptable	Acceptable
Cummings Middle School	6-8	Acceptable	Acceptable	Acceptable	Acceptable
Faulk Middle School	6-8	Acceptable	Acceptable	Acceptable	Acceptable
Senator Eddie A. Lucio Middle School	6-8	Acceptable	Acceptable	Acceptable	Acceptable
Oliveira Middle School	6-8	*Recognized*	*Recognized*	*Recognized*	Acceptable
Perkins Middle School	6-8	Acceptable	Acceptable	Acceptable	Acceptable
Stell Middle School	6-8	*Recognized*	*Recognized*	*Recognized*	*Recognized*
Filemon B. Vela Middle School	6-8	*Recognized*	Acceptable	Acceptable	*Recognized*
Bruce Aiken Elementary	EE-5	Acceptable	Acceptable	*Recognized*	***Exemplary***
A. X. Benavides Elementary	EE-5		Acceptable	*Recognized*	Acceptable
Burns	EE-5	Acceptable	Acceptable	Acceptable	*Recognized*

Elementary					
Canales Elementary	PK-5	Acceptable	Acceptable	Acceptable	Acceptable
Josephine Castaneda Elementary	EE-5	*Recognized*	Acceptable	Acceptable	*Recognized*
A. A. Champion Elementary	PK-5				Acceptable
Clearwater Elementary	PK-5	Acceptable	Acceptable	*Recognized*	***Exemplary***
Cromack Elementary	EE-5	Acceptable	Acceptable	*Recognized*	*Recognized*
Del Castillo Elementary	PK-5	*Recognized*	*Recognized*	*Recognized*	Acceptable
Egly Elementary	EE-5	*Recognized*	*Recognized*	*Recognized*	***Exemplary***
El Jardin Elementary	EE-5	Acceptable	Acceptable	Acceptable	Acceptable
Dr. Ruben Gallegos Elementary	EE-5				*Recognized*
Garden Park Elementary	EE-5	Acceptable	*Recognized*	*Recognized*	*Recognized*
Garza Elementary	EE-5	Acceptable	Acceptable	Acceptable	Acceptable
Gonzalez Elementary	PK-5	Acceptable	Acceptable	Acceptable	*Recognized*
Hubert R. Hudson Elementary	EE-5	*Recognized*	*Recognized*	*Recognized*	***Exemplary***
Longoria Elementary	EE-5	Acceptable	*Recognized*	***Exemplary***	***Exemplary***
R. L. Martin Elementary	EE-5	Acceptable	*Recognized*	*Recognized*	*Recognized*
Morningside Elementary	PK-5	***Exemplary***	***Exemplary***	***Exemplary***	***Exemplary***
Palm Grove	PK-5	Acceptable	*Recognized*	*Recognized*	*Recognized*

Elementary					
Dr. Americo Paredes Elementary	EE-5				*Exemplary*
Perez Elementary	EE-5	Acceptable	Acceptable	*Recognized*	Acceptable
Putegnat Elementary	PK-5	*Recognized*	*Recognized*	*Recognized*	*Exemplary*
Resaca Elementary	PK-5	*Recognized*	*Recognized*	*Exemplary*	*Exemplary*
Russell Elementary	EE-5	*Recognized*	*Exemplary*	*Exemplary*	*Exemplary*
Sharp Elementary	EE-5	*Recognized*	*Recognized*	*Exemplary*	*Exemplary*
Skinner Elementary	PK-5	Acceptable	Acceptable	Acceptable	Acceptable
Southmost Elementary	EE-5	Acceptable	Acceptable	Acceptable	Acceptable
Vermillion Road Elementary	EE-5	Acceptable	Acceptable	Acceptable	Acceptable
Victoria Heights Elementary	EE-5	Acceptable	Acceptable	Acceptable	*Recognized*
Villa Nueva Elementary	EE-5	*Exemplary*	*Recognized*	*Exemplary*	*Exemplary*
Mary & Frank Yturria Elementary	PK-5	*Recognized*	*Recognized*	*Recognized*	*Exemplary*
Exemplary Recognized Acceptable AE: Acceptable Low Performing **Total***		**2** 17 23 1 0 **43**	**2** 19 22 1 0 **44**	**8** 18 17 1 0 **44**	**14** 15 17 1 0 **47**

Source: TEA, AEIS, 1998-99 through 2001-02 and BISD Enrollment by Grade Level, September 4, 2002.

Schools, statewide, receiving an *Exemplary* or *Recognized* rating increased from 43.6 percent in 1998-99 to 60.7 percent in 2001-02. During that same period, BISD schools receiving an *Exemplary* or *Recognized* rating increased from 44.2 percent to 61.7 percent (**Exhibit 2-12**).

Exhibit 2-12
Accountability Ratings by Percent of Schools
BISD and the State
1998-99 through 2001-02

Accountability Rating	Percent of Schools							
	1998-99		1999-2000		2000-01		2001-02	
	BISD	State	BISD	State	BISD	State	BISD	State
Exemplary	4.7%	16.5%	4.5%	18.8%	18.2%	22.5%	29.8%	26.9%
Recognized	39.5%	27.1%	43.2%	29.1%	40.9%	33.3%	31.9%	33.8%
Acceptable	53.5%	46.3%	50.0%	42.2%	38.6%	35.4%	36.2%	29.2%
Low Performing	0.0%	0.5%	0.0%	2.1%	0.0%	1.4%	0.0%	2.3%
Alternative Education	0.2%	5.8%	2.3%	5.8%	2.3%	4.8%	2.1%	5.5%
Other*	0.0%	3.8%	0.0%	2.0%	0.0%	2.5%	0.0%	2.3%
Total	99.9%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Source: TEA, AEIS, 1998-99 through 2001-02.
Note: Totals may not equal 100 percent due to rounding.
*Includes ratings of Acceptable: Data Issues" and "No Rating" based on data quality,
PK-K schools and issues related to charter schools.

District and school accountability ratings are determined, in part, by student performance on the TAAS. Although the state intends that every Texas public school student enrolled in grades 3 through 8 and grade 10 take the TAAS, not every student's performance is used to determine school and district accountability ratings. Under certain circumstances, a student may not be tested or his or her test performance may not be included in the accountability ratings. In the district's "participation profile," TEA reports the number of students participating in TAAS and

any reasons for non-participation. Explanations for a student's non-participation include:

- The student is absent during test administration.
- The student takes the test but was not enrolled in the district by the last Friday in the previous October. These students are referred to as the "mobile subset."
- The student is in special education in any grade between 3 and 8 and is tested using the state developed alternative assessment (SDAA).
- The student receives a special education Admission, Review and Dismissal exemption for every test.
- The student is in any grade between 3 and 8, is in his or her first three years of enrollment in the U.S. and receives a bilingual education Limited English Proficiency (LEP) exemption as an immigrant.

During 2001-02, 93.9 percent of all BISD students were tested using the TAAS. However, the performance of only 81.3 percent of students tested counted toward the district's rating. The district's mobile subset, 2.9 percent of tested students, did not contribute to the district's rating because they were not enrolled in the district by the last Friday of the previous October. An additional 9.6 percent of those tested did not contribute because they were tested using the state developed alternative assessment while 6.1 percent of BISD students were not tested for various other reasons.

The percent of BISD students tested on the state developed alternative assessment is the second highest among its peer districts and higher than the Region 1 and statewide averages. Likewise, the percent of students not tested at all is the second highest among peer districts and higher than the Region 1 and state averages. However, the percent of students taking the TAAS, but who were not enrolled by October, is lower than the averages in the peer districts, Region 1 or the state (**Exhibit 2-13**).

Exhibit 2-13
Students Tested/Not Tested on TAAS
BISD, Peer Districts, Region 1 and the State
2001-02

District	Percent of Students Tested or Not Tested on TAAS				
	Students Tested		Students Not Tested		
	Performance Not Counted	Performance Counted	Total Not	LEP Exempt	ARD Exempt

	Mobile Subset	SDAA	(Accountability Subset)	Tested		
Brownsville	**2.9%**	**9.6%**	**81.3%**	**6.1%**	**3.3%**	**1.4%**
Corpus Christi	3.7%	6.9%	86.0%	3.4%	0.4%	1.2%
Laredo	2.9%	16.7%	73.6%	6.8%	4.0%	1.5%
North East	4.7%	6.5%	86.1%	2.6%	0.5%	1.0%
Plano	3.1%	4.8%	89.1%	3.0%	1.5%	0.7%
Ysleta	3.5%	6.1%	86.6%	3.9%	1.2%	1.2%
Region 1	**4.6%**	**7.8%**	**82.7%**	**5.0%**	**2.5%**	**1.1%**
State	**4.8%**	**6.4%**	**85.0%**	**3.8%**	**1.4%**	**1.1%**

Source: TEA, AEIS, 2001-02.
Note: Totals may not equal 100 percent due to rounding.

In addition to TAAS related information, AEIS provides data on other performance indicators, including dropout and graduation rates. There are two student dropout rates that AEIS reports: the annual rate and the four-year rate, which is also called the *longitudinal* rate. The annual dropout rate is the percent of students in grades 7 through 12 who leave school during one school year for reasons other than graduation, receipt of a GED, death or continuance of an education elsewhere. The four-year dropout rate is the percent of students entering grade 9 who, four years later, did not graduate, earn a GED or are still enrolled at the time the class graduates. The dropout and graduation rates that AEIS reports are for the year prior to the actual reporting date. Consequently, for 2001-02, the most recent dropout and graduation rates are for 2000-01.

Between 1999-2000 and 2000-01, the annual dropout rate remained constant for all students, as well as for economically disadvantaged students, in grades 7 through 12. The dropout rate for special education students declined from 1 percent to 0.9 percent. In 2000-01, BISD's dropout rate was the third lowest among peer districts for all students and the second lowest for economically disadvantaged and special education students. Similarly, the dropout rate in BISD was lower than or equal to the rate in Region 1 and the state for all three groups of students (**Exhibit 2-14**).

Exhibit 2-14
Annual Dropout Rate Grades 7-12

BISD, Peer Districts, Region 1 and the State
1999-2000 and 2000-01

District	Percent of Students Dropping Out Annually					
	All Students		Economically Disadvantaged Students		Special Education Students	
	1999-2000	2000-01	1999-2000	2000-01	1999-2000	2000-01
Brownsville	**1.0%**	**1.0%**	**0.8%**	**0.8%**	**1.0%**	**0.9%**
Corpus Christi	1.3%	1.0%	1.3%	0.9%	2.1%	1.6%
Laredo	1.0%	1.2%	0.9%	1.0%	1.3%	1.8%
North East	0.8%	0.6%	0.9%	0.8%	1.2%	1.1%
Plano	0.2%	0.3%	0.5%	0.6%	0.4%	0.5%
Ysleta	2.1%	1.4%	1.5%	1.2%	2.3%	1.6%
Region 1	**1.7%**	**1.2%**	**1.3%**	**0.9%**	**1.9%**	**1.6%**
State	**1.3%**	**1.0%**	**1.3%**	**1.0%**	**1.6%**	**1.2%**

Source: TEA, AEIS, 1999-2000 and 2000-01.

TEA conducted a study to determine the number of dropouts during 2000-01 for all districts in Texas. The percent of BISD students who dropped out of grades 7-12 during 2000-01 was the third lowest in the state and among peer districts. The percent of African American and Anglo dropouts was the lowest among peer districts and second lowest for Hispanic and economically disadvantaged students (**Exhibit 2-15**).

Exhibit 2-15
Annual Dropout Rates by Student Group in Grades 7-12
BISD, Peer Districts and the State
2000-01

District	All Students			Dropout Rate by Student Group			
	Dropouts	Total Students	Dropout Rate	African American	Hispanic	Anglo	Economically Disadvantaged
Plano	57	21,441	0.3%	0.6%	0.5%	0.2%	0.6%
North East	157	24,829	0.6%	0.5%	1.0%	0.4%	0.8%

District	Dropouts	Total Students	Dropout Rate	African American	Hispanic	Anglo	Economically Disadvantaged
Brownsville	**165**	**17,011**	**1.0%**	**0.0%**	**1.0%**	**0.2%**	**0.8%**
Corpus Christi	184	18,518	1.0%	1.3%	1.2%	0.5%	0.9%
Laredo	113	9,274	1.2%	0.0%	1.2%	0.8%	1.8%
Ysleta	321	22,418	1.4%	0.5%	1.5%	0.9%	1.2%
State	**17,563**	**1,818,940**	**1.0%**	**1.3%**	**1.4%**	**0.5%**	**1.0%**

Source: TEA, Division of Research and Evaluation, August 2002.

The annual dropout rate in 2000-01 for students in grades 9-12 was slightly higher than the rate for students in grades 7-12. The rate for students in BISD was 1.2 percent, making it the third lowest among peer districts and lower than that statewide. The rate for African American and Anglo students was the lowest among peer districts and lower than the state percent. The annual dropout rate for Hispanics was the second lowest among peer districts and lower than the statewide rate

(**Exhibit 2-16**).

Exhibit 2-16
Annual Dropout Rates by Student Group in Grades 9-12
BISD, Peer Districts and the State
2000-01

District	All Students			Dropout Rate by Student Group			
	Dropouts	Total Students	Dropout Rate	African American	Hispanic	Anglo	Economically Disadvantaged
Plano	53	13,704	0.4%	0.9%	0.7%	0.3%	0.9%
North East	148	16,250	0.9%	0.8%	1.4%	0.6%	1.3%
Brownsville	**133**	**10,922**	**1.2%**	**0.0%**	**1.3%**	**0.3%**	**1.0%**
Corpus Christi	146	12,098	1.2%	1.7%	1.5%	0.5%	1.1%
Laredo	100	5,957	1.7%	*	1.7%	1.2%	1.3%
Ysleta	316	15,277	2.1%	0.5%	2.2%	1.2%	1.8%
State	**16,003**	**1,180,252**	**1.4%**	**1.8%**	**2.0%**	**0.8%**	**1.5%**

Source: TEA, Division of Research and Evaluation, August 2002.
*Not reported to protect student anonymity.

Chapter 2
EDUCATIONAL SERVICE DELIVERY

A. STUDENT PERFORMANCE AND INSTRUCTIONAL DELIVERY (PART 2)

The four-year, or longitudinal, dropout rate for BISD students in grades 9-12 is the third lowest among peer districts and is lower than the statewide rate. The dropout rate for African Americans was the lowest among peer districts, while the rate for Hispanic and economically disadvantaged students was the second lowest and the rate for Anglos was the third lowest. The rates for all three student groups were lower than those for the state as a whole (**Exhibit 2-17**).

Exhibit 2-17
Four-Year Dropout Rates by Student Group in Grades 9-12
BISD, Peer Districts and the State
2000-01

District	All Students			Dropout Rate by Student Group			
	Dropouts	Total Students	Dropout Rate	African American	Hispanic	Anglo	Economically Disadvantaged
Plano	48	2,738	1.8%	2.6%	4.8%	1.4%	4.6%
North East	155	3,382	4.6%	7.3%	8.0%	2.2%	10.0%
Brownsville	**127**	**2,258**	**5.6%**	**0.0%**	**5.7%**	**3.0%**	**5.5%**
Corpus Christi	161	2,501	6.4%	5.1%	7.5%	4.6%	10.2%
Laredo	93	1,144	8.1%	*	8.0%	6.3%	7.1%
Ysleta	256	3,305	7.7%	6.1%	8.4%	3.1%	9.2%
State	**15,551**	**249,161**	**6.2%**	**8.4%**	**9.6%**	**3.5%**	**9.9%**

Source: TEA, Division of Research and Evaluation, August 2002.
*Not reported to protect student anonymity.

For the four-year period ending in 2000-01, BISD's longitudinal dropout rate was lower than the previous four-year period for all students, including economically disadvantaged and special education students. Among peer districts, for the four-year period ending in 2000-01, BISD's longitudinal dropout rate was the third lowest for all students and the second lowest for economically disadvantaged students and special

education students. The district's four-year dropout rate ending in 2000-01 was lower than the rates in Region 1 and the state for all students, economically disadvantaged students and special education students (**Exhibit 2-18**).

Exhibit 2-18
Four-Year Dropout Rate Grades 9-12
BISD Peer Districts, Region 1 and the State
1999-2000 and 2000-01

	Percent of Students Dropping Out Over a Four-Year Period					
	All Students		Economically Disadvantaged Students		Special Education Students	
District	Class of 2000	Class of 2001	Class of 2000	Class of 2001	Class of 2000	Class of 2001
Brownsville	**8.5%**	**5.6%**	**8.3%**	**5.5%**	**13.8%**	**5.1%**
Corpus Christi	7.7%	6.4%	11.2%	10.2%	12.0%	8.9%
Laredo	10.1%	8.1%	7.3%	8.1%	8.5%	11.8%
North East	5.3%	4.6%	9.6%	10.0%	5.9%	7.2%
Plano	1.5%	1.8%	7.9%	4.6%	1.3%	1.7%
Ysleta	10.0%	7.7%	9.7%	9.2%	10.5%	10.8%
Region 1	**8.5%**	**7.6%**	**8.6%**	**7.7%**	**13.1%**	**11.4%**
State	**7.2%**	**6.2%**	**11.6%**	**9.9%**	**11.0%**	**9.7%**

Source: TEA, AEIS, 1999-2000 and 2000-01.

FINDING

BISD initiated a number of reading intervention efforts that have resulted in improved student performance on the reading portion of the TAAS. Prior to 1994-95, 14 BISD schools were rated by TEA for accountability purposes as *Low performing*. Of 47 BISD schools receiving accountability ratings for 2001-02, 14 schools were rated as *Exemplary*, 15 were rated as *Recognized,* and 18 as *Acceptable.* Not one school received a *Low performing* rating.

Between 1996-97 and 1999-2000, BISD applied for and received six Academics 2000 grants totaling $650,000. The grant money was used to train 350 first- and second-grade teachers in the Language Enrichment I

Program, which was sponsored by the Neuhaus Learning Center in Houston. The nine-week training was conducted through distance learning in once-a-week sessions. In two follow-up sessions, participants completed demonstration lessons for Neuhaus Learning Center representatives. Also participating in the coursework were Reading Department faculty members from the University of Texas at Brownsville, teachers from private schools and pre-service students. Local and bilingual education funds were used to train the district's kindergarten teachers in the Neuhaus Reading Readiness Program and the Esperanza Spanish Language Arts Program.

Reading Academies' grants in 1998-99 and 1999-2000 totaling $1,092,972 provided library services for PreK-2 students and parents of PreK-3 students and afforded dyslexia training for BISD teachers. Librarians or other designated individuals read to PreK and kindergarten students who, at the story's end, were required to answer comprehensive questions about it. Parents contributed by reading to first- and second-grade students, and then used the Accelerated Reader software with the children for comprehension development. Extended day and Saturday sessions were available. Nearly 50 BISD teachers of dyslexic students attended three weeks of training at the Neuhaus Learning Center. The Reading Academies also provided multi-sensory grammar and scientific spelling training to 200 fourth- through eighth-grade teachers and gave tutorials for fourth- through eighth-grade students.

The Brownsville READS! Task Force, a group of community members, has helped the district's reading reform efforts through it's mission, "to ensure that all Brownsville students read at grade level or above, by the end of the second grade and continue to read at grade level throughout their academic career." Beginning in 1997-98, the task force has provided annual reading symposiums featuring state and national leaders in the field of reading. Themes for the symposiums have included: teacher awareness; teacher training and community awareness; and the medical community, instructional leadership and college and university schools of education.

As a result of the reform efforts, the progress each K-2 student is exhibiting in reading is now measured three times a year by either the Texas Primary Reading Inventory (PRI) or the Tejas Lee. Both instruments measure progress and diagnosis weaknesses in reading readiness and reading acquisition. Teachers use the results to plan instruction and remediate identified weaknesses. Between 1997, when the tests were first administered, and 2001, the percent of kindergarten students demonstrating mastery of phonological awareness skills increased from 42 percent to 79 percent. First and second grade students have achieved similar results.

COMMENDATION

BISD has initiated reading reform efforts that have resulted in improved results on the TAAS reading sub-test.

FINDING

BISD has developed a process for communicating and disseminating instructional-related information that reduces the number and repetition of central office communications. Each Wednesday, the PK-12 curriculum administrator distributes a packet of information to elementary, middle school and high school principals with copies provided to area superintendents, middle and high school deans of instruction, elementary instructional facilitators and selected personnel in the division of instruction. To control the volume of memoranda received by campus personnel, all written communications from central office instructional specialists, with the exception of emergency messages, must be included in the weekly-distributed packet.

Although some of the information provided principals at each level is identical, the packets allow instructional personnel to distribute level-specific information to the appropriate staff. For example, for information distributed for the weeks of August 19-23, August 26-30 and September 2-6, 2002, 16 informational items were included in the packets for elementary principals, 19 items in the middle school packets and 17 items in the high school packets. Of those items, six were common to all levels and the remainder were sent to principals at only one or two of the three levels (**Exhibit 2-19**).

Exhibit 2-19
Distribution of Items in Principals' Information Packets
BISD Office of PK-12 Curriculum Administrator
August 19-23, August 26-30 and September 2-6, 2002

Item	Included in Packet Prepared for		
	Elementary School	Middle School	High School
Benchmark testing information	X	X	X
Facilitators' meeting schedule	X		
Campus responsibilities charts	X	X	X
Language Enrichment Training	X		
Budget information on TPTR fund	X		

Overtime and schedules on PK program	X		
Dual Language program	X		
Benchmark testing information	X	X	
Selection of HPE department chairperson	X	X	X
Voluntary benchmark test review meeting	X		
Super Saturday Science training dates	X	X	
Coordinated Approach to Child Health training	X		
Registration for Quest training	X	X	X
Family Life Human Sexuality Parent Permission Letter	X	X	X
Campus testing survey	X	X	X
Effective Writing training	X		
Middle school dean's meeting schedule		X	
TEKS-based research project		X	X
ESL training for Algebra I teachers		X	X
Mathematics chairpersons' meeting schedule		X	X
Language Enrichment II training		X	
TEXTEAMS training for IPC teachers		X	X
Social studies chairpersons' meeting schedule		X	X
Science chairpersons' meeting schedule		X	X
Language arts chairpersons' meeting schedule		X	X
Language arts vertical alignment meetings		X	X
TEXTEAMS Algebra I assessment		X	X

training			
High school dean's meeting schedule			X
New Promotion Criteria: Parent Letter			X
Total	**16**	**19**	**17**

COMMENDATION

BISD uses a system to efficiently communicate curriculum and instruction information to principals enhancing staff development and effectively reducing the volume of central administrative communications.

FINDING

Since 2000-01, the district initiated a wide range of programs to support and encourage all students to consider college after graduation. BISD is involved in the TEA sponsored *Gear-Up Program* through Region 1, University of Texas Brownsville, and Pan American University. Implemented in fall 2001, *Gear-Up* provides opportunities to middle school students, high school students and their parents to help them prepare for college. The program provides staff training, curricula, parent workshops, after school academic and summer programs, college tours and awareness sessions that help prepare students for college.

A Student Assistance for Furthering Education counselor working with local higher education staff provides training and information programs for students and parents to assist them in making plans for their post-secondary education. Activities include listening to presentations by college representatives, as well as attending workshops on college admissions processes, testing requirements and financial aid. Students are assisted in filling out the FAFSA (Financial Form for Student Assistance). To promote the importance of attending college, the district works with the local newspaper and the district television station to provide information to students and parents.

According to *Just for the Kids*, a partner in the National Center for Educational Accountability with the University of Texas at Austin and the Education Commission of the States, among the state's most successful schools in sending graduating seniors to colleges and universities were

Lopez, Porter and Rivera High Schools. They were also noted for their success in having their students remain in college after two years. The district operates a large, beneficial summer school program for students needing to make up credits or pursue course acceleration opportunities. Over 9,000 students participated in the summer 2002 program, with more than 1,000 taking advantage of course acceleration opportunities. Various grants provided tuition-free access for approximately two-thirds of the participants.

The district participates with Texas Tech University in the Credit by Exam with Prior Knowledge Program. The program allows students to earn credits required for graduation. In 2001-02, more than 1,370 students participated, taking more than 2,600 exams in the four core areas, in foreign languages and in selected electives. Through November 2002, 579 students have taken more than 1,100 examinations. Because of the program's popularity, BISD plans to offer two additional test cycles during 2002-03.

A number of co-curricular activities and events are provided for students, such as the three annual UIL Practice Math meets, which BISD has hosted the last nine years, that provide students with activities designed to challenge their mathematical abilities. The Annual Elementary Physical Education Demonstration and the Annual Elementary Physical Education Field Day provide opportunities for students to perform in public, to compete with their peers and to participate in activities that encourage social interaction. Science fairs at the elementary and secondary levels have been annual, long-running events, too. The Elementary Science Fair provides every child in grades 3-5 the opportunity to develop a science project for competition with other students throughout the district. Almost 800 students participated in 2001-02. The Secondary Science Fair encourages students to engage in research and scientific inquiry. More than 350 students participated in the Fair in 2001-02, with 200 advancing to regional competition and over 130 to state competition. One student advanced to the International Science Fair where she received a four-year college scholarship. Students are also encouraged to participate in year-long history projects that culminate with an historical presentation. Reading comprehension, critical thinking and problem-solving skills are cultivated in the process of developing the presentations.

The district budgets $15,000 annually for each high school to pay student fees for the PSAT, SAT, ACT or TASP. The district will pay for one test, chosen by the student, while the student is enrolled in a BISD high school.

COMMENDATION

BISD is implementing a variety of programs to support and encourage all students to attend college after graduating from high school.

FINDING

Although the district is offering a variety of programs to encourage students to attend college, the percent of BISD students that graduated in 1999 and passed all three sections of the Texas Academic Skills Program (TASP) Test on their initial attempt was the second lowest among peer districts and less than two-thirds of the percent statewide. The district jointly participated with Region 1, the University of Texas at Brownsville and Pan American University in *Project Gear Up*, yet all BISD graduating high-school students did not participate in the college-preparedness program, and the district did not track any correlation between participation in *Project Gear Up* and student success on the TASP.

The Texas Legislature established the TASP in 1987 as a means of ensuring that students attending colleges and universities in Texas possess the basic academic skills required for succeeding at the college or university level. Section 51.306 of the TEC requires an assessment in reading, writing and mathematics of all students entering post-secondary education in Texas. Students who do not demonstrate mastery on one or more of the test sections must undergo continuous remediation until they demonstrate mastery on the TASP Test. With some exceptions, students not passing all sections of the test may not obtain an associate's degree or certain certificates at community colleges, nor can they take upper-division work at universities. In 1997, the Texas Legislature authorized the use of four tests as alternatives to TASP: "ASSET" and "COMPASS" from ACT and "MAPS" and "ACCUPLACER" from the College Board.

A student is exempt from taking the TASP if he or she:

- has an ACT composite score of 23;
- has a SAT combined score of 1070;
- has scores of 1770 on the TAAS writing portion, a Texas Learning Index (TLI) score of 86 on the TAAS math portion and a TLI score of 89 on the TAAS reading portion; or
- is enrolled in a certificate program of 42 semester credit hours or less at a public community college or technical college.

Students may take the test before graduating from high school or before the end of the first semester after enrollment at a post-secondary institution. Students who do not pass all three sections of the TASP are required to retake the sections they failed until they pass. Colleges and universities are required to offer developmental education courses to assist

students in improving their reading, writing or math skills in order to pass the TASP.

BISD surveys graduating seniors to determine their plans after graduation. Of 1,761 graduates in 2001-02, 1,425, or 80.9 percent, intended to enroll in either a two-year or four-year college or university and 336, or 19.1 percent, intended to enroll in a vocational or technical school, join the armed services, enter the workplace or were undecided. No efforts are made by the district to track graduates once they've graduated. This includes efforts by BISD staff to track students' passing rates on the TASP and enrollment of students in any developmental or remedial courses to assist students in efforts to pass this test. Also, counselors did not mention specific training or counseling sessions for students about the TASP offered by the district.

The Texas Higher Education Coordinating Board's (THECB) Center for College Readiness issues reports on the TASP pass rates of students enrolling in Texas colleges and universities. The most recent report is for the 1995-99 high school graduating classes. It indicates that the percent of first-time test takers passing all three parts of TASP, as well as the three parts individually, has declined between 1995 and 1999 for each racial/ethnic group-Native American, Asian, African American, Hispanic and Anglo-and for all groups combined (**Exhibit 2-20**).

Exhibit 2-20
Statewide Initial TASP Pass Rates by Race/Ethnicity and Test Area
1995 and 1999 High School Graduating Classes

Race/ Ethnicity	High-school Class	Total Graduates	Pass Rate			
			All 3 Parts	Reading Only	Math Only	Writing Only
All Groups	1995	73,207	51.7%	75.3%	64.3%	80.8%
	1999	77,562	28.6%	56.2%	41.2%	63.3%
Native American	1995	161	52.8%	77.0%	66.5%	89.4%
	1999	156	29.5%	56.4%	46.2%	67.3%
Asian	1995	3,168	53.9%	69.7%	85.2%	66.9%
	1999	2,316	33.8%	54.4%	61.8%	58.2%
African American	1995	7,015	31.8%	60.8%	43.4%	69.3%
	1999	10,412	16.0%	43.2%	25.8%	56.0%
Hispanic	1995	18,121	37.9%	65.4%	53.2%	72.2%
	1999	25,058	20.7%	47.9%	33.5%	62.5%
	1995	44,742	60.3%	82.0%	70.7%	87.1%

Anglo	1999	39,620	36.7%	65.0%	48.9%	75.9%

The percent of BISD 1999 graduates who enrolled in a post-secondary education institution was the highest among the peer districts and higher than the percent statewide. The percent of BISD graduates enrolling in college who did not have to take the TASP test due to an exemption was the second lowest among the peer districts and lower than the percent statewide. Conversely, the percent of BISD graduates having to take the TASP was the highest among the peer districts and higher than that for the state (**Exhibit 2-21**).

Exhibit 2-21
College-Bound Graduates
Percent With and Without TASP Exemption
BISD, Peer Districts and the State
Class of 1999

District	Graduates			
	Number	**Percent College Bound**	**Percent with TASP Exemption**	**Percent Taking TASP**
Ysleta	2,797	53.4%	6.9%	46.5%
Brownsville	**1,941**	**67.2%**	**9.9%**	**57.3%**
Laredo	1,160	63.4%	10.9%	52.4%
Corpus Christi	2,139	56.8%	16.0%	40.8%
North East	2,761	59.5%	21.4%	38.1%
Plano	2,442	63.1%	35.1%	28.0%
State	**203,393**	**55.3%**	**17.2%**	**38.1%**

The percent of BISD students passing all three sections of the TASP on the initial administration and the percent of BISD students passing the reading, math or writing sections of the TASP was the second lowest among peer districts and lower than the pass rate statewide (**Exhibit 2-22**).

Exhibit 2-22
Pass Rates of TASP First-Time Test-Takers
BISD, Peer Districts and the State
Class of 1999

District	First-time TASP Test-Takers			
	Percent Passing All Tests	Percent Passing Reading Test	Percent Passing Math Test	Percent Passing Writing Test
Laredo	13.7%	41.4%	28.1%	46.7%
Brownsville	**16.2%**	**41.7%**	**30.7%**	**47.2%**
Ysleta	20.4%	42.6%	33.4%	71.6%
Corpus Christi	27.1%	62.6%	37.5%	71.3%
North East	36.6%	66.0%	46.1%	83.1%
Plano	40.3%	63.4%	51.2%	66.9%
State	**28.6%**	**56.2%**	**41.2%**	**68.3%**

Source: THECB, Center for College Readiness, September 2002.

In 1996, the THECB commissioned an evaluation of TASP by the National Center for Developmental Education (NCDE). A team of eight consultants conducted site visits to 20 Texas colleges and universities to interview administrators, faculty, staff and students. The National Center for Developmental Education collected, reviewed and analyzed student performance information available through THECB and various documents including course syllabi and evaluation reports. The information gathered was used to determine the adequacy of the TASP instrument and the effects of its usage, the results of the implementation of TASP, and whether there was a continued need for the test.

The NCDE evaluation report contained 37 findings and recommendations on the TASP, several of which were directed, in part, to public schools including the following, some of which are relevant to BISD:

- A large number of high school graduates had little or no knowledge about the TASP or its purpose with very few indicating that they had been counseled about the test by high school staff.
- Little effort is made at either the public school or higher education level to develop or enhance articulation efforts regarding the TASP.

- Because the poorest students are the most likely to obtain low scores on tests such as TASP, they are the ones most likely to be placed in remediation.
- Students performed the poorest on the mathematics section of the TASP, both on initial testing and on testing following remediation.

In BISD and the peer districts, the districts with the highest percent of economically disadvantaged students have the lowest percent of college-bound graduates passing the TASP on their first attempt, as well as the lowest TAAS/TASP equivalency percent. The TAAS/TASP equivalency percent is the number of graduates with scores sufficiently high on the exit-level TAAS to have a 75 percent likelihood of passing the TASP. Among peer districts, BISD had the second highest percent of economically disadvantaged students, the second lowest percent of graduates passing all three sections of the TASP on the first attempt and the second lowest TAAS/TASP equivalency (**Exhibit 2-23**).

Exhibit 2-23
Percent of Economically Disadvantages Students,
First-Time TASP Test-Takers and TAAS/TASP Equivalency
BISD, Peer Districts and the State
1999

District	Percent Economically Disadvantaged	Pass Rate of First-Time TASP Test-Takers	TAAS/TASP Equivalency
Laredo	89.5%	13.7%	34.8%
Brownsville	**89.0%**	**16.2%**	**40.5%**
Ysleta	71.8%	20.4%	40.7%
Corpus Christi	53.0%	27.1%	49.9%
North East	36.6%	36.6%	57.5%
Plano	8.6%	40.3%	76.0%
State	**48.5%**	**28.6%**	**53.5%**

Source: THECB, Center for College Readiness, September 2002.

The NCDE studies of the TASP relevant to public schools note that the most effective school districts develop plans to ensure that high school seniors receive information about the TASP and give them an opportunity to discuss the requirements with an informed counselor, district staff member or a liaison from a two- or four-year higher education institution. In addition, some districts band together to form committees to study

student performance on assessments, such as the TASP, with a committee membership that includes teachers, counselors, administrators and higher education partners. These districts use student performance results to amend current presentations and create or assess collaborative partnerships. Many districts also disseminate TASP performance information to both parents and graduating seniors and solicit their input on changes to currently offered programs.

Some districts encourage high-school students to participate in Advanced Placement or enhanced college-preparatory courses to better prepare students for the TASP should they decide to pursue courses at the college level. The NCDE study also noted that some national districts with high TASP passing rates make greater efforts to ensure that minority students take two years of Algebra in high school, which ultimately prepares students for the math portion of the TASP because it has the greatest number of initial student failures.

Many districts successfully increasing TASP pass rates annually evaluate all TASP related programs for effectiveness using student scores and student, parent and staff input as a measure of success. They additionally maintain ongoing relationships with THECB and local institutions to assess the success of students graduating and pursuing higher education coursework. THECB and the Texas Workforce Commission both track high school graduates attending public post-secondary institutions in Texas or those employed in the state or by federal agencies. THECB then provides data on such students by county, district and high school. The Texas Workforce Commission, through its Career Development Resources Department, tracks high school graduates three, five and seven years after graduation and links the state's reported education data to THECB's Master Enrollment file. Some of this data includes: student name; date of birth; demographic characterics such as gender, ethnicity, economic disadvantage, limited English proficiency, special education, gifted and talented and at-risk designation; district; type of vocational high school program attended; and graduation type.

The Career Development Resources Department also links the state's data with wage records for public high school graduates employed in the state and federal agencies and provides this information to TEA for storage at both the district and student level. Wage records identify the name of the employer, employer firm size, industry and wages per quarter. Districts in Texas have access to all of this information supplied and maintained at TEA.

Recommendation 10:

Conduct effectiveness evaluations of TASP-related programs and include student performance as a measure of success and program change.

BISD should include a review of *Project Gear Up* and all collaborative partnerships and TASP related programs to determine their effect on the improvement of TASP scores of BISD graduates. It should also review the number of students taking and subsequently passing two years of high-school Algebra. The district should review all counseling programs regarding dissemination of information about the TASP, and then use all of these analyses to supplement THECB and Texas Workforce Commission post-secondary education and employment information to implement necessary changes in future evaluations and program implementations.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent directs the assistant superintendent for Curriculum and Instruction to develop a plan to evaluate districtwide TASP-related programs including district, state, THECB and Texas Workforce Commission data and staff, student and parent suggestions.	March 2003
2.	The assistant superintendent for Curriculum and Instruction contacts TEA and THECB for BISD post-secondary graduation and employment information and information on school districts and higher education institutions that successfully that have procedures for informing students about TASP and increasing TASP student scores.	March 2003
3.	The assistant superintendent for Curriculum and Instruction convenes a committee of teachers, principals, other appropriate staff, students, university personnel and community and business representatives to review and analyze received data.	April - June 2003
4.	The committee presents recommendations for improvement to TASP-related programs to the assistant superintendent for Curriculum and Instruction for review and approval.	June 2003
5.	The assistant superintendent receives and reviews the committee's recommendations and submits them to the superintendent for review and approval.	July 2003
6.	The superintendent submits recommendations to the board for approval.	July 2003
7.	The assistant superintendent assumes responsibility for implementing the approved plan and monitoring student TASP scores for regular status reports to the superintendent and board.	August 2003 and Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 2
EDUCATIONAL SERVICE DELIVERY

B. GIFTED AND TALENTED EDUCATION (PART 1)

Section 29.122 of the TEC states that school districts "shall adopt a process for identifying and serving gifted and talented students in the district and shall establish a program for those students in each grade level." Section 29.123 requires the State Board of Education (SBOE) to "develop and periodically update a state plan for the education of gifted and talented students" to be used for accountability purposes "to measure the performance of districts in providing services to students identified as gifted and talented." The SBOE plan, adopted in 1996 and revised in 2000, provides direction for the refinement of existing services and the creation of additional curricular options for gifted and talented (G/T) students.

The *Texas State Plan for the Education of Gifted/Talented Students* establishes three levels of performance measures-Acceptable, Recognized and Exemplary-for five program areas: student assessment, program design, curriculum and instruction, professional development and family-community involvement. "Acceptable" performance measures are those required by state law or rule. The "Recognized" and "Exemplary" measures are provided as "viable targets that local district educators seeking excellence, both for their district and for its students, may strive to attain." The components required for "Acceptable" status as well as those required for districts seeking "Recognized" or "Exemplary" program status are indicated in **Exhibit 2-24**.

Exhibit 2-24
Gifted and Talented Program Requirements
Curriculum and Instruction
Acceptable, Recognized and Exemplary Status Components

Component Required for Acceptable Status	Component Required for Recognized Status	Component Required for Exemplary Status
An array of appropriately challenging learning experiences is offered emphasizing content from the four core academic areas.	Opportunities are provided for students to pursue areas of interest in selected disciplines through guided and independent research. Opportunities are provided for career and leadership assessment and training in	Options are provided in intellectual, creative or artistic areas; leadership; and specific academic fields.

	areas of student strength.	
A continuum of learning experiences is provided leading to the development of advanced-level products or performances.	Students at all levels are involved in experiences resulting in development of advanced-level products or performances targeted to audiences outside the classroom.	Students in G/T programs for more than one year will develop advanced-level products evaluated by external evaluators knowledgeable about the area of the product.
Opportunities are provided for students to accelerate in areas of student strengths.	Flexible pacing is used allowing students to learn at the pace and level appropriate to their abilities and skills.	Scheduling modifications are used to meet the needs of individual students.
District and campus improvement plans include provisions related to the needs of gifted and talented students.	Curriculum is modified based on annual evaluations. Resources and release time for staff are provided for curriculum development. Guidelines are developed and used for evaluating resources and in selecting appropriate materials.	Collaboration occurs among appropriate staff in designing and evaluating curriculum for gifted and talented students.
	Release time or contract extensions are provided to enable teachers at all levels to collaboratively develop services for gifted and talented students.	
	Student progress or performance is periodically assessed and communicated to parents.	Student performance is assessed by standards developed by experts in the areas served in the district's program.

Source: TEA, Texas State Plan for the Education of Gifted/Talented Students, May 2000.

BISD began the G/T program in 1986 with magnet schools serving students at all levels. In 1996, the program, GALAXY, was revised to serve students at their home schools. As implemented in 1996, the GALAXY program was an academic program designed to identify all students who perform at or show the potential for performing at a high achievement level when compared to others of the same age, experience or environment. In 1998, BISD expanded the program to include students in

four areas of Fine Arts; music and visual arts in grades 1-12 and theatre arts and dance in grades 9-12.

The percent of G/T students identified by BISD is the second lowest of the peer group and is lower than the percent in both the state and Region 1. The number of teachers identified as working with gifted students was second highest among the peer districts, higher than the statewide percent but lower than the percent in Region 1. The percent of expenditures budgeted for G/T was the lowest among the peer districts (**Exhibit 2-25**).

Exhibit 2-25
Percent of Students, Teachers and Budgeted Instructional Operating Expenditures
Gifted/Talented Programs
BISD, Peer Districts, Region 1 and the State
2001-02

District	Percent G/T Student Enrollment	Percent G/T Teachers	Percent G/T Budgeted Instructional Expenditures
Brownsville	**5.4%**	**4.1%**	**0.1%**
Corpus Christi	4.2%	1.1%	0.2%
Laredo	8.6%	6.9%	0.3%
North East	6.8%	1.7%	0.8%
Plano	9.4%	1.0%	0.6%
Ysleta	7.4%	0.1%	0.2%
Region 1	**8.6%**	**4.9 %**	**1.6%**
State	**8.2%**	**2.3%**	**1.8%**

Source: TEA, AEIS, 2001-02.

Between 1997-98 and 2001-02, BISD's budgeted instructional operating expenditures for all programs increased 18.3 percent while expenditures per student enrolled increased 12.1 percent. During the same period, G/T enrollment decreased by 9.9 percent, from 2,572 to 2,318, while expenditures for G/T programs decreased by 15.1 percent, from $200,000 to $169,870. Expenditures per student enrolled in gifted and talented programs decreased 6.4 percent, from $78 to $73.

The decrease in funding coincided with reorganization of the program changing the delivery of services for gifted students from magnet to home school which increased the number of teachers working with gifted

students but decreased the amount of time the teachers worked with G/T students. **Exhibit 2-26** provides data on program costs.

Exhibit 2-26
BISD Budgeted Instructional Operating Expenditures
All Programs and Gifted and Talented Program
1997-98 and 2001-02

Expenditure Category	1997-98	2001-02	Percent Increase/ (Decrease) from 1997-98 through 2001-02
Expenditures, All Programs*	$133,384,898	$157,733,992	18.3%
Student Enrollment	40,324	42,541	5.5%
Expenditures per Student Enrolled	$3,308	$3,708	12.1%
Expenditures, G/T Program	$200,000	$169,870	(15.1%)
G/T Enrollment	2,572	2,318	(9.9%)
Expenditure per G/T Student Enrolled	$78	$73	(6.4%)

Source: TEA, AEIS, 1997-98 and 2001-02.
*Instruction and Instructional Leadership (11, 95 and 21).

FINDING

The district implemented a program that identifies and serves gifted students in a dual language setting to ensure all students, irregardless of primary language skills, are served according to state guidelines and to promote student literacy in both English and Spanish. *Project SOL: Symbiosis of Languages* is a dual language program currently implemented in grades K-3 at six schools. The goals of the program include developing literacy in two languages whether the student is a native English or Spanish speaker, achieving academic proficiency in all academic areas and acquiring an understanding and appreciation of other cultures. This component was added to the gifted program to increase the level of instruction of primary students and to help identify more primary and Spanish-speaking children.

The program identifies gifted and high performing students, both English and Spanish speakers, at the end of pre-K and places them in classes with reading taught in the student's dominant language, mathematics in English and science and social studies in Spanish. Although not documented, district personnel indicate that at these schools, enrollment in the gifted program is increasing as the students have opportunities to work at higher levels in both languages.

All students in the SOL classes, whether identified gifted or not, receive instruction in interdisciplinary curriculum that is the core curriculum for the district's G/T program. There is an identified "Language of the Day" for speaking, daily news, story time, etc. Students may transfer from other schools. One school, Canales Elementary, has implemented the concept of dual language throughout the school and the Bilingual department is exploring adding other schools in a general education dual language program.

COMMENDATION

BISD developed and implemented an elementary program that identifies and provides dual language gifted instruction to promote student literacy in both English and Spanish and meet state criteria for serving G/T students.

FINDING

The Advanced Academics Program is not fully staffed and does not report to the Curriculum and Instruction Department. When Brownsville implemented its current program design, a program administrator and seven resource teachers were provided to oversee the program. Six of the resource teachers give support to teachers and one implements the testing program.

Since May 2002, the department has been without the program administrator, who was reassigned as a middle school principal, and two resource teachers. Although posted in May, the positions remained unfilled. In August, the Advanced Academics Department was reassigned from the division of Curriculum and Instruction Department to an area assistant superintendent removing it from direct interaction with other academic programs.

This has resulted in the resource teachers providing support to more schools and teachers reducing the time they can spend on problems or giving consequential support. Resource teaching staff said their effectiveness has been limited since they are now responsible for 12 to 13

schools and three special projects rather than eight to 10 schools and one to two special projects when fully staffed.

Recommendation 11:

Return oversight of the Advanced Academics program to the Curriculum and Instruction Department and hire staff to fill current vacancies.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The superintendent working with the assistant superintendent for Curriculum and Instruction reorganizes to include Advanced Academics in the Curriculum and Instruction Department.	April 2003
2.	The assistant superintendent for Curriculum and Instruction oversees the hiring process to replace the program administrator and fill vacancies for two resource teachers.	May - July 2003

FISCAL IMPACT

Because these vacant positions are included in the 2002-03 budget, this recommendation can be implemented with existing resources.

FINDING

BISD does not meet state requirements for gifted and talented staff training. All teachers who work in the gifted program are required to take 30 hours of training including six hours on the nature and needs of gifted students, six hours on identification, 12 hours on differentiating curriculum and six hours on creativity and instructional strategies.

Under local BISD policy, all principals and counselors must meet the same 30-hour requirement. This requirement is above the six hours required by the state. District staff development reports indicate that there are teachers, administrators and counselors who have not completed these minimal training requirements. Based on a September 2002 staff development report, only three schools Cummings Middle School, Resaca Elementary and Rivera High School had 100 percent of the staff trained while one, Gallegos Elementary, only had 30 percent trained. Schools needing only one person trained included Burns Elementary, Castaneda Elementary, Cromack Elementary, Gonzalez Elementary and Perkins Middle School. The remaining 34 schools had two or more staff without the required basic training.

In 2002-03, the Advanced Academics Department increased the number of offered G/T training sessions including one week that required teachers to be out of class and another session that breaks the training into blocks that can be completed on Saturdays. Currently, the Advanced Academics Department carries the responsibility for providing staff training, but principals have the responsibility of insuring training requirements are met.

BISD policy also requires teachers working with identified gifted students participate in an additional 12 hours of professional development annually that relate to the education of gifted students. This requirement is also higher than the six hours required by the state.

The *Texas State Plan for the Education of Gifted/Talented Students* recommends that districts have a written plan for professional development in the area of gifted education that contains current and long-range plans. According to the state's recommendations in this plan, teachers are also encouraged to pursue advanced degrees or obtain additional professional development in their teaching discipline. Many districts provide support in the form of released time or tuition assistance for teachers and counselors in the gifted and talented program. The state plan recommends that the long-range plan for professional development culminates in endorsement in gifted/talented education and/or advanced degrees for a majority of the teachers who provide advanced level services.

Recommendation 12:

Ensure all teachers, counselors and principals receive state- and district-required gifted and talented training hours and track annual participation rates.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The assistant superintendent for Curriculum and Instruction, program administrator for Advanced Academics and area superintendents who oversee schools work together to develop a plan that includes the process, timeline and accountability for meeting and maintaining the required staff development training for those working with gifted students.	March 2003
2.	The program administrators for Advanced Academics and Staff Development work together to determine those who still need training and communicate to building principals, assistant superintendents and assistant superintendent for Curriculum and Instruction.	March 2003

3.	The assistant superintendent for Curriculum and Instruction forwards the plan to the superintendent for review and approval.	April 2003
4.	The assistant superintendent for Curriculum and Instruction communicates the plan and timeline for implementation to all stakeholders.	May 2003
5.	Assistant superintendents and principals monitor training of staff reassigning teachers who do not complete the training.	Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

BISD does not have a Gifted and Talented program improvement plan and inconsistently identifies students at the elementary and middle school levels. Campus Improvement Plans do not address the process for grouping students identified in G/T programs According to the *Texas State Plan for Education of Gifted/Talented Students*, meeting the curricular and instructional needs of gifted and talented students requires modifications to the regular school program. Although BISD does not have a current program improvement plan, the district has well written, guidelines that address state plan requirements and provide the necessary information for implementation including:

- standard operating procedures that provide administrative guidelines;
- a program handbook designed for teachers to support classroom differentiation; and
- an advanced academic calendar of services that includes professional development sessions, testing schedules and competition schedules.

Students are not being appropriately grouped on either elementary or secondary schools. Campus plans do not address processes that ensure such grouping occurs. At the high school level, classes with gifted students may include advanced placement students and regular education students making differentiation and the needed rigor more difficult for teachers.

Improvement plans for Advanced Academic Services were part of the district's strategic plan that ends in 2002 and used process rather than student results as criteria for success. The current draft of the district's strategic plan does not directly address gifted students, their unique needs or problems identified in evaluation reports prepared by the district. The

advanced academics department has developed a strategic plan, but it remains focused on processes and does not address needs identified in district or DEC evaluation reports.

The timeline for identification of students contributes to the problem of implementation. The current testing calendar requires that students be tested in the fall for placement at mid-term. However, depending of the student's grade or class, they may be required to wait at least one full semester before receiving services that begin the following fall.

Other identification concerns were raised in the 2001-02 annual evaluation of the gifted program. The report identified identification of migrant, LEP, at-risk and special education students as an area requiring improvement. This concern is not addressed in the August 2002 draft of the current curriculum department strategic plan.

Research indicates that giftedness appears in a given population between 3 percent and 12 percent. Although the G/T enrollment in BISD districtwide is 5.1 percent, the number of students identified at elementary and middle schools varies. Less than 1 percent of the students at Clearwater Elementary have been identified as G/T compared to 6.7 percent of the student population at Hubert Hudson Elementary. At the 10 middle schools, the percent of identified G/T students ranges from 2.8 percent at Central to 8.0 percent at Stell and 7.9 percent at Oliveira. The total enrollment and percent of G/T students at each BISD school are shown in **Exhibit 2-27**.

Exhibit 2-27
BISD Identified Gifted and Talented Students by School

School	Total Enrollment*	Percent of G/T Students per School
A. A. Champion Elementary	717	0.9%
A. X. Benavides Elementary	802	2.9%
Bruce Aiken Elementary	800	2.5%
Burns Elementary	983	1.2%
Cameron County JJAEP	15	0.0%
Canales Elementary	776	4.7%
Central Middle	828	2.8%
Clearwater Elementary	388	0.7%

Cromack Elementary	834	1.7%
Cummings Middle School	936	5.7%
Del Castillo Elementary	556	2.0%
Dr. Americo Paredes Elementary	638	4.1%
Dr. Ruben Gallegos Elementary	592	0.8%
Dr. Juliette V. Garcia Middle School	**	**
Egly Elementary	968	3.4%
El Jardin Elementary	951	1.0%
Faulk Middle School	907	4.0%
Filemon B. Vela Middle School	1,238	6.7%
Garden Park Elementary	820	1.1%
Garza Elementary	831	1.0%
Gonzalez Elementary	1,070	0.9%
Hanna High	2,613	15.0%
Hubert R. Hudson Elementary	871	6.7%
Josephine Castaneda Elementary	597	2.3%
Lincoln Park Alt. Ed.	154	2.5%
Longoria Elementary	458	2.1%
Lopez High School	1,735	8.5%
Mary & Frank Yturria Elementary	823	4.7%
Morningside Elementary	849	3.5%
Oliveira Middle	1,204	7.9%
Pace High School	1,952	9.0%
Palm Grove Elementary	551	1.6%
Perez Elementary	592	4.5%
Perkins Middle	1,181	3.4%
Porter High School	1,870	8.6%
Putegnat Elementary	593	0.7%
R. L. Martin Elementary	674	1.9%
Raul Besteiro Junior Middle	1,101	3.5%

Resaca Elementary	386	2.8%
Rivera High School	1,903	7.8%
Russell Elementary	899	7.5%
Sen. Eddie A. Lucio Junior Middle	995	3.8%
Sharp Elementary	496	10.2%
Skinner Elementary	640	3.6%
Southmost Elementary	698	2.9%
Stell Middle	992	8.0%
Vermillion Road Elementary	997	1.3%
Victoria Heights Elementary	635	1.7%
Villa Nueva Elementary	432	4.6%
District Total	**42,541**	**5.1%**

Chapter 2
EDUCATIONAL SERVICE DELIVERY

B. GIFTED AND TALENTED EDUCATION (PART 2)

Identified students are passing TAAS in very high numbers; however, reports generated by the district indicate that, except in Spanish Language, identified students are not scoring well on Advanced Placement examinations. A comparison of identified students and non-identified students scores on the 2002 examinations indicates that only 26.4 percent of identified students score in the Recognized areas of 3, 4 or 5 among BISD students who take the exams (**Exhibit 2-28**).

Exhibit 2-28
BISD Identified Gifted Students' Performance on
Advanced Placement Examinations for
Spring 2002

Total Students Taking AP Exams	Number of Identified G/T Students Taking AP Exams	Number of Identified G/T Students Scoring 3, 4 or 5 on AP Exams	Percent of Identified G/T Students Scoring 3, 4 or 5 on AP Exams
1,549	231	61	26.4%

Source: BISD, Advanced Academic Services Department, August 2002.

Based on the *Texas State Plan for the Education of Gifted/Talented Students*, the qualities of the most successful gifted programs include providing rigorous aligned curriculum, active facilitation of program options by central office and campus administrators and periodic assessment of students against standards developed by experts. The effective programs also use clearly defined lines of accountability for student performance and success at both the campus and central administrative levels.

Many districts also include both participation data as well as student performance on Advanced Placement examinations in addition to TAAS performance and college entrance examination scores when determining the success of programs for gifted and talented students. Teachers, administrators and students also provide input to many of these districts regarding gifted and talented program effectiveness. Districts with successful gifted and talented programs also include program evaluations and identified areas for improvement in documented program

improvement plans and use resources such as regional education service centers when adjusting both improvement plans and implementing programmatic changes.

Recommendation 13:

Develop a gifted and talented program improvement plan and include student AP examination scores in program evaluations.

The district should review student scores on Advanced Placement tests as well as gifted and talented identification procedures and program options when conducting programmatic evaluations of district and campus gifted and talented programs. Identified areas for improvement should be included in the program improvement plan.

IMPLEMENTATION STRATEGIES AND TIMELINES

1.	The program administrator of Advanced Academics works with principals to review Advanced Placement student scores, gifted and talented identification procedures and previous gifted and talented program evaluations to identify areas for improvement including a clear line of campus accountability for implementation of the program.	April - May 2003
2.	The program administrator of Advanced Academics contacts Region 1, TEA for resources to supplement development of a program improvement for the gifted and talented program.	April 2003
3.	The program administrator of Advanced Academics and principals develop a draft plan for improvement of the gifted and talented program.	June 2003
4.	The administrator of Advanced Academics presents the draft to the assistant superintendent of Curriculum and Instruction for review and approval	July 2003
5.	The assistant superintendent of Curriculum and Instruction presents the approved draft to the superintendent for review and approval.	July 2003
6.	The superintendent presents the draft to the board for approval.	August 2003
7.	The program administrator of Advanced Academics coordinates modifications to the district program, monitors implementation and provides regularly scheduled status reports to the assistant superintendent for Curriculum and Instruction, superintendent and board.	September 2003 and Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

BISD students' Advanced Placement (AP) Examination scores and participation rates are low on all courses tested except Spanish Language. AP is a nationally recognized program that introduces students to university-level work while they are still in high school. The results of student performance on the examinations are widely accepted as a valid measurement of how well students are likely to perform in the same courses taken in college. Over 90 percent of the nation's colleges and universities have an AP policy granting incoming credit, placement, or both, for satisfactory grades on AP exams. In 2001, almost 821,000 students in U.S. high schools took at least one AP examination in 35 courses in 19 subject areas.

In 1998-99, the percent of BISD students taking an AP examination was third lowest among peer districts and lower than the percent in Region 1 and the state. In 1999-2000, the percent of BISD students taking an AP exam remained the third lowest among peer districts but was higher than the percent in Region 1 and the state. In 2000-01, the percent of BISD students taking an AP exam was the third highest among peers and higher than the percent in both Region 1 and the state (**Exhibit 2-29**).

Exhibit 2-29
Percent of Students Tested
Advanced Placement Examinations
BISD, Peer Districts, Region 1 and the State
1998-99 through 2000-01

District	Percent of Students Tested		
	1998-99	1999-2000	2000-01
Brownsville	**9.0%**	**15.3%**	**21.5%**
Corpus Christi	7.8%	11.2%	15.4%
Laredo	15.6%	18.8%	26.0%
North East	8.1%	9.8%	17.3%
Plano	30.5%	28.2%	36.1%
Ysleta	14.2%	17.2%	20.0%

Region 1	12.7%	15.2%	17.2%
State	11.0%	12.7%	14.3%

To award credit or advanced standing for an AP course, colleges and universities generally require an AP examination score of three, four or five, with three defined as "qualified," four as "well-qualified" and five as "extremely well-qualified." The percent of BISD students with scores of three, four or five was the lowest among the peer districts in 1999-2000 and 2000-01 and was the third lowest in 1998-99. The percent of BISD students with a score of three, four or five was lower than the percent in Region 1 and the state in the last two years, but slightly above the Region in 1998-99
(**Exhibit 2-30**).

Exhibit 2-30
Percent of AP Examination Scores with a Score of 3, 4 or 5
BISD, Peer Districts, Region 1 and the State
1998-99 through 2000-01

District	Percent of Scores of 3, 4 or 5		
	1998-99	1999-2000	2000-01
Brownsville	**39.3%**	**27.1%**	**21.2%**
Corpus Christi	54.9%	44.9%	43.5%
Laredo	38.4%	33.1%	33.8%
North East	60.0%	56.1%	51.6%
Plano	81.9%	81.4%	76.8%
Ysleta	29.4%	28.8%	23.3%
Region 1	**36.2%**	**36.2%**	**35.1%**
State	**55.7%**	**53.9%**	**50.1%**

In 2001, the percent of BISD students in grades 11 and 12 taking at least one AP exam was the third highest among peer districts although the number of students was third lowest. However, the number and percent of BISD students with an examination score of 3, 4 or 5 was the lowest among the peer districts (**Exhibit 2-31**).

Exhibit 2-31
2001 AP Examination Results
BISD and Peer Districts

District	Number of Students in Grades 11-12	Number of Students Taking at Least One AP Course	Percent of Students Taking at Least One AP Course	Number of Students with at Least One Score >= 3	Percent of Students with at Least One Score >= 3	Total Number of AP Exams	Number of AP Exam Scores >= 3	Percent of AP Exam Scores >= 3
Brownsville	**3,641**	**783**	**21.5**	**227**	**29.0**	**1,286**	**272**	**21.1**
Corpus Christi	3,863	595	15.4	307	51.6	1,028	447	43.5
Laredo	1,999	519	26.0	265	51.1	880	297	33.8
North East	5,493	948	17.3	525	55.4	1,826	943	51.6
Plano	5,313	1,908	35.9	1,563	81.9	4,881	3,681	75.4
Ysleta	5,630	1,125	20.0	358	31.8	1,860	433	23.3

Source: TEA, 2000 Advanced Placement and International Baccalaureate Examination Results in Texas, August 2001.

Results of AP examinations are sent to students, their high schools and the colleges designated by the students to receive the results. The *AP Grade Reports* are sent to the colleges or universities in early July and to the students and their schools by mid-July. When five or more students take a particular exam, the high school receives a *Report to AP Teachers* that compares the performance of its students with the performance of students nationally. According to the *AP Grade Reports* sent to the district, BISD students received 1,631 examination grades covering 12 AP courses during 2001-02. The district had 458 scores, or 28 percent, of 3, 4 or 5 on the AP course examinations taken by its students in that year (**Exhibit 2-32**).

Exhibit 2-32
BISD Advanced Placement Examination Grades
2001-02

Course Description	Grade of 3 (Qualified)	Grade of 4 (Well-Qualified)	Grade of 5 (Extremely Well-Qualified)
	Percent of Course Total	Percent of Course Total	Percent of Course Total
Biology	0.0%	0.0%	0.0%
Calculus AB	8.8%	4.4%	3.7%
Economics: Macro	0.0%	0.0%	0.0%
English Language and Composition	4.8%	1.3%	0.0%
English Lit and Composition	9.2%	0.0%	0.0%
Government	1.3%	0.6%	0.0%
Physics B	0.0%	0.0%	0.0%
Physics C: Electronic and Magnetic	0.0%	0.0%	0.0%
Physics C: Mechanics	0.0%	0.0%	0.0%
Spanish Language	10.3%	28.9%	56.9%
Spanish Literature	39.4%	18.9%	5.5%
U.S. History	0.8%	0.5%	0.0%
Percent of Grades 3, 4 and 5	**29.3%**	**28.4%**	**42.3%**
Percent of All Grades	**8.2%**	**7.9%**	**11.9%**

Source: College Board, BISD 2002 Student Grade Reports by Subject, September 2002.

In the fall 2002, districts involved in the TEA's Middle School Spanish Project were invited to participate in a one-year pilot project underwriting the costs of the PSAT for participating sophomores. Using software provided by the College Board, scores will be disaggregated to predict students' future performance in AP classes. Potentially high-scoring students will be identified for special programming to assist them in preparation for later testing.

The report, *Reaching the Top*, sponsored by the College Board calls for the implementation of affirmative development strategies to address the needs of minority students who are potential high achievers. Strategies

include providing academically rich curriculum and instruction K-12, providing teachers trained in ways to improve student performance and working with local universities to explore new ways to improve achievement of minority students.

The College Board has also instituted a Pre-AP program to include help for teachers and administrators of insure students in Pre-K12 grades receive challenging coherent instruction. They recommend that districts establish strong communications among teachers, align the curriculum vertically, introduce advanced concepts and strategies in elementary and middle schools and develop methods to determine the progress of students.

In May 2000, the Mid-continent Research for Education and Learning (McREL) research findings indicate that successful academic programs provide all students with rigorous curricula, teacher training and support for students including regular assessment of student progress and additional instructional time so students do not fall behind.

The Education Trust (March 2001) describes a program implemented in El Paso, Texas, that involves a higher involvement with the local university in teacher training and an increase in standards in teacher training.

Recommendation 14:

Implement strategies to increase participation rates and improve student scores on Advanced Placement examinations.

Simply increasing the number of students taking the exam is not sufficient. The district must assure students experience rigorous courses that prepare them for the exams and for higher education.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The program administrator for Advanced Academics contacts the College Board to determine the programs and resources available including training for teachers to increase participation rates and prepare students to be successful on AP exams.	March 2003
2.	The program administrator for Advanced Academics meets with AP teachers, students enrolled in AP classes, counselors and administrators to decide on ways to increase enrollment in AP classes.	April 2003
3.	The program administrator for Advanced Academics and a selected group of faculty, staff and students develop	April 2003

	recommendations for aligning and improving classroom instruction and assisting students in preparation for AP exams including an annual evaluation of the performance of students over time on information and skills tested.	
4.	The assistant superintendent of Curriculum and Instruction submits the proposed implementation and evaluation plans to the superintendent for review and approval.	May 2003
5.	The superintendent submits the plan to the Board of Trustees for approval.	June 2003
6.	The program administrator for Advanced Academics initiates the program and provides regularly scheduled status reports to the superintendent and board.	September 2003 and Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The percent of BISD students taking college entrance examinations and scoring at or above the criterion are less than half of the state rates. BISD's percentages are, however, slightly higher than those for the region. The College Board's SAT I: Reasoning and SAT II: Subject Tests are designed to assess the academic skills deemed important to a student's success in college. The American College Testing Program Assessment (ACT) is designed to evaluate the general educational development of high school students and their ability to complete college-level work. In Texas, most four-year post-secondary institutions use either the SAT I or ACT in some combination with other criteria as a requirement for entry. Although the standards vary based on the selectivity of the college or university, most often, the higher the score on the entrance examination, the lower the grade point average that is required for entrance. Texas colleges and universities must admit applicants who graduate with grade point averages in the top 10 percent of their classes regardless of the entrance examination score. Therefore, scoring well on the SAT I or ACT is of particular importance in being accepted for post-secondary studies for students whose grade point averages are not in the top 10 percent of their classes.

The SAT I is composed of two parts, verbal and math. The verbal test focuses on critical reading. Students are required to read passages from the sciences, social sciences and humanities and to discuss the authors' points of view, techniques and logic. The math test requires students to apply problem-solving techniques and use math flexibly in thinking about

solutions to new and different problems. The ACT examination includes 200+ multiple-choice questions covering English, mathematics, reading and science reasoning based on high school curriculum. It also includes an interest inventory that provides information for career and educational planning.

The percent of BISD students taking the SAT I or ACT is the second lowest among peer districts and lower than the percent in Region 1 and the state.The average SAT I and ACT scores of BISD students and scores at or above the criterion used by TEA for reporting SAT I and ACT information in AEIS1110 on the SAT I and 24.0 on the ACT were the third lowest among peer districts

(**Exhibit 2-33**).

Exhibit 2-33
SAT I and ACT Scores, Students Tested and Average SAT I and ACT Scores
BISD, Peer Districts, Region 1 and the State
Class of 2001

District	Percent of Students With SAT/ACT Scores At or Above 1110/24.0	Percent of Students Tested	Average SAT I Score	Average ACT Score
Brownsville	**11.3%**	**33.1%**	**883**	**17.9**
Corpus Christi	11.9%	58.7%	979	19.6
Laredo	5.0%	29.8%	860	17.6
North East	33.2%	75.8%	1016	21.0
Plano	55.7%	89.8%	1122	23.7
Ysleta	7.2%	90.9%	820	19.8
Region 1	**10.8%**	**51.9%**	**905**	**17.5**
State	**27.3%**	**62.2%**	**987**	**20.2**

Source: TEA, AEIS, 2000-01.
Note: SAT/ACT scores reported are for the prior year.

The percent of BISD students with SAT I or ACT scores at or above the criterion remained about the same for the classes of 1999 and 2000 with an increase in 2001. The percent of BISD students with scores at or above the criterion was lower that the percent in Region 1 and much lower than

the state for all three years. The percent of students taking the test did not follow the same pattern as that for the percent of students scoring at or above the criterion. There was an increase between the classes of 1999 and 2000 and then a decline in 2001. These data are provided in **Exhibit 2-34**.

Exhibit 2-34
Percent SAT I/ACT Scores and Students Tested
BISD, Region 1 and the State
Classes of 1999, 2000 and 2001

District	Percent of Students with SAT I or ACT Scores At or Above Criterion			Percent of Students Tested		
	Class of 1999	Class of 2000	Class of 2001	Class of 1999	Class of 2000	Class of 2001
Brownsville	8.7%	8.4%	11.3%	31.9%	37.0%	33.1%
Region1	10.9%	10.8%	10.8%	48.7%	49.7%	51.9%
State	27.2%	27.2%	27.3%	61.7%	61.8%	62.2%

Source: TEA, AEIS, 1998-99 through 2000-01.

The College Board and American College Testing Program both offer various strategies for assisting students with test preparation. The College Board encourages students to take the Preliminary Scholastic Aptitude Test (PSAT) to prepare for the SAT. It also offers free analysis of resulting test scores offering suggested methods for improvements in student areas of weakness to schools or districts requesting this information. Both the College Board and American College Testing Program offer test preparation software to schools.

Many districts offer in-school and after school tutoring programs specifically designed to address test-taking skills and the type of information included in college entrance exams. Many of these districts also use the software from the College Board and the American College Testing Program on a districtwide basis and individualize programs to address areas needing strengthening for each student who participates. Some districts provide specific staff development on college entrance exams and the curricular content to teachers, counselors, students and parents, and some use business partners and volunteers as mentors to students promoting effective study skills and participation in advanced coursework and college preparatory classes.

Recommendation 15:

Increase student participation and passing rates for college entrance examinations.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent of Curriculum and Instruction assigns to the administrator of Pre-K12 Curriculum the responsibility for chairing a committee of teachers, students, administrators and support staff to: review district curricula and information and programs currently available to assist students with test preparation, determine the extent to which students use the available information and make recommendations regarding how student participation and scoring on the PSAT, SAT and ACT exams can be improved.	March 2003
2.	The committee contacts the College Board, the American College Testing Program, regional education service centers, TEA and school districts with a high percent of students scoring at or above the criterion score on the PSAT, SAT or ACT to identify successful programs available to assist BISD students.	March 2003
3.	The committee submits recommendations to the superintendent through the assistant superintendent of Curriculum and Instruction for increasing the number of students in college preparatory classes, increasing student participation on the SAT and ACT and methods for assisting them in preparing for the examinations.	May 2003
4.	The superintendent submits the recommendations to the Board of Trustees for approval and assigns implementation to the assistant superintendent for Curriculum and Instruction.	June 2003
5.	The superintendent includes any new estimated costs for the approved program in the proposed 2003-04 budget.	June 2003
6.	The assistant superintendent of curriculum and Instruction begins implementing plan.	August 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 2
EDUCATIONAL SERVICE DELIVERY

C. LIBRARY/MEDIA SERVICES

Section 33.021 of the TEC states, "Texas State Library and Archives Commission, in consultation with the State Board of Education, shall adopt standards for school library services. A school district shall consider the standards in developing, implementing or expanding library services." In May 1997, the Texas State Library and Archives Commission (TSLAC) adopted the *School Library Program Standards: Guidelines and Standards*. These guidelines are intended to ensure that students and staff become effective users of ideas and information, enabling them to be literate lifelong learners. To accomplish this task, the school library program should provide instruction in information gathering and the evaluation of resources, individual guidance and access to materials in multiple formats.

To assist districts, the guidelines provide criteria identifying programs as Exemplary, Recognized, Acceptable or Below standard in five areas: library learning environment, curriculum integration, resources, library program management and facilities. **Exhibit 2-35** provides examples of these rating criteria.

Exhibit 2-35
TSLAC School Library Standards
1997

Standard	Acceptable Rating	Recognized Rating	Exemplary Rating
School library staffing	1 librarian and 0.5 paraprofessional per 700 students	1 librarian and 1 paraprofessional per 700 students	1 librarian and 1.5 paraprofessionals per 700 students
District staffing (6-15 programs)	1 all-level, certified director/coordinator with additional district duties	1 all-level, certified director/coordinator with other district duties; 1 technical services specialist	1 all-level, certified director/coordinator with no other district duties
Funding for library resources, equipment, supplies	Receives not less than 1percent of total instructional budget	Receives not less than 2percent of total instructional budget	Receives not less than 3percent of total instructional budget

Resources	9,000 for fewer than 600 students; 15 items per student if more than 600	10,000 for fewer than 600 students; 18 items per student if more than 600	12,000 for fewer than 600 students; 20 items per student if more than 600
Periodicals	--HS 45-75 --MS 40-70 --ES 20	--HS 45-120 --MS 45-70 --ES 35	--HS 55-125 --MS 50-125 --ES 45
News sources	1 local and 1 state or international paper and 1 full-text data base	1 local and 1 state or international paper and 1 full-text database	1 local and 1 state or international paper and 1 full-text database
Electronic data bases	Full text periodical and news databases	Full-text periodical and news databases	Full-text periodical and news databases
Statewide resources	Participation in TLC	Participation in TLC	Participation in TLC
Scheduling	Modified flex/controlled	Mostly flex/some scheduled	Total flexible scheduling
Librarian/teacher planning	Attends grade level department meetings with teachers; plans some lessons to correlate with content areas	Plans collaboratively with individual teachers on a regular basis.	Collaborates with individual teachers at scheduled times to integrate library instruction with content areas
Access to library	Controlled access to resources and librarian during the instructional day; minimal access beyond the instructional day	Some access to resources and librarian at point of need, some controlled; access available beyond the school day	Individual and group access to resources and librarian at point of need, beyond the instructional day, either on site or electronically
Teaching	Librarian teaches library/media lessons; provides individual reference assistance; introduces research tools	Librarian offers instruction on use of library resources as needed; facilitates use of technology; teaches information resources within	Librarian teaches information literacy models; engages, directs and encourages students in research and use of technology; totally integrates

		curriculum context	library instruction with content instruction

Source: Texas State Library and Archives Commission (TSLAC), School Library Programs, Standards and Guidelines for Texas, 1997.

BISD has 52 librarians, one at each elementary and middle school and two at each high school, and most schools have one library aide. All librarians are certified. School librarians report to the principals at their respective schools and work centrally with the administrator for Library/Media Services.

Follett Software Company online circulation and public access catalog programs are implemented at all schools. All libraries have Internet access and are connected to the Texas Library Connection (TLC) educational technology initiative of the Texas Education Agency. TLC provides statewide electronic sharing of resources for K-12 schools and libraries. In addition, middle school and high school libraries have access to the following online databases: ABC-CLIO, Bigchalk.com, EBSCO MAS On-Line, Newsbank and SIRS (Social Issues Resources). Elementary schools have access to Electric Library, and the district will provide EBSCO MAS Primary during the 2002-03 school year.

FINDING

BISD's library program does not meet the recommended state guidelines for the number of books available to students. During 2001-02, BISD evaluated its library program using state standards. One component of the study evaluated each library based on the state standard for the number of books per student in a library. Fifteen books per student resulted in a rating of "Acceptable," 18 items per student resulted in a rating of "Recognized" and 20 items per student resulted in an "Exemplary" rating. Less than 15 items per student resulted in a rating of "Below standard."

Based on state standards, BISD found 15 Exemplary campuses, 11 Recognized campuses, nine Acceptable campuses and 10 campuses Below standard. Of the 10 schools ranked as Below standard, six opened within the last seven years. According to district personnel, population growth has impacted the district's ability to provide the appropriate number of books for all district library collections. **Exhibit 2-36** shows the status of each of BISD's campus library collections.

Exhibit 2-36
BISD Library Collections by School
June 2002

School	Number of Books	Enrollment	Number of Books Per Student	TEA Library Status
Hanna High School	35,643	2,596	13.7	Below Standard
Lopez High School	31,239	1,743	17.9	Recognized
Pace High School	26,714	1,933	13.8	Below Standard
Porter High School	38,878	1,856	20.9	Exemplary
Rivera High School	32,451	1,850	17.5	Recognized
Raul Besteiro, Junior Middle School**	16,696	990	16.9	Acceptable
Central Middle School	18,175	842	21.6	Exemplary
Cummings Middle School	16,213	935	17.3	Acceptable
Faulk Middle School	15,827	915	17.3	Acceptable
Sen. Eddie A. Lucio Middle School	11,893	1,005	11.8	Below Standard
Oliveira Middle School	20,671	1,206	17.1	Acceptable
Perkins Middle School	20,950	1,190	17.6	Recognized
Stell Middle School	12,575	1,001	12.6	Below Standard
Filemon B. Vela Middle School	21,857	1,251	17.5	Recognized
Bruce Aiken**	11,834	761	15.6	Acceptable
A. X. Benavides Elementary	11,502	917	12.5	Below Standard
Burns Elementary	22,547	1,010	22.3	Exemplary
Canales Elementary	15,023	784	19.2	Recognized
Josephine Castaneda Elementary	12,872	630	20.4	Exemplary

A. A. Champion Elementary *	8,013	734	10.9	Below Standard
Clearwater Elementary	14,998	370	40.5	Exemplary
Cromack Elementary	16,287	833	19.6	Exemplary
Del Castillo Elementary	9,971	564	17.7	Recognized
Egly Elementary	13,135	982	13.4	Below Standard
El Jardin Elementary	17,434	988	17.7	Recognized
Dr. Ruben Gallegos Elementary *	8,695	618	14.1	Below Standard
Garden Park Elementary	13,875	831	16.7	Acceptable
Garza Elementary	18,073	819	22.1	Exemplary
Gonzalez Elementary	17,925	1,072	16.7	Acceptable
Hubert R. Hudson Elementary	10,095	875	11.5	Below Standard
Longoria Elementary	14,178	466	30.4	Exemplary
R. L. Martin Elementary	14,457	678	21.3	Exemplary
Morningside Elementary	19,834	871	22.8	Exemplary
Palm Grove Elementary	8,748	557	15.7	Acceptable
Dr. Americao Paredes Elementary ***	--	--	--	--
Perez Elementary	14,117	590	23.9	Exemplary
Putegnat Elementary	12,064	577	20.9	Exemplary
Resaca Elementary	9,168	378	24.3	Exemplary
Russell Elementary	15,376	906	17.0	Recognized
Sharp Elementary	12,122	498	24.3	Exemplary
Skinner Elementary	12,486	648	19.3	Recognized
Southmost Elementary	17,302	703	24.6	Exemplary
Vermillion Elementary	17,761	1,014	17.5	Recognized
Victoria Heights Elementary	12,105	649	18.7	Recognized
Villa Nueva Elementary	7,646	440	17.4	Acceptable
Mary & Frank Yturria	10,926	831	13.2	Below

Elementary				Standard

Ten schools were ranked as below standard. **Exhibit 2-37** lists the total number of books required for the library to be rated as acceptable, the number of books currently at each library and the number of additional books required to meet the standard of "acceptable" according to the evaluations available from TEA and used by BISD for their self-evaluation.

Exhibit 2-37
Book Status of Below Standard School Libraries
May 2002

School	State "Acceptable" Standard Based on Enrollment	Books in Collection	Books Needed to Meet Standard
Hanna High School	38,940	35,643	3,297
Pace High School	28,995	26,714	2,281
Senator Eddie A. Lucio Middle School	15,075	11,893	3,182
Stell Middle School	15,015	12,575	2,440
A. X. Benavides Elementary	13,755	11,502	2,253
A. S. Champion Elementary	11,010	8,013	2,997
Egly Elementary	14,730	13,135	1,595
Dr. Ruben Gallegos Elementary	9,270	8,695	575
Hubert R. Hudson Elementary	13,125	10,095	3,030
Mary & Frank Yturria Elementary	12,465	10,926	1,539

Total	**172,380**	**149,191**	**23,189**

According to comparisons to TEA's standards and performed by the administrator of the district's Library and Media Services Department, BISD requires in excess of 24,524 new books to qualify for an "acceptable" rating and approximately 82,429 new books to qualify for an exemplary rating. **Exhibit 2-38** presents the number of new books that would be needed by school for each rating.

Exhibit 2-38
New Library Books Needed To Meet TSLAC Standards by School
June 2002

School	New Books Needed for TSLAC Rating		
	Acceptable	**Recognized**	**Exemplary**
Hanna High School	3,297	11,085	16,277
Pace High School	2,281	8,080	11,946
Senator Eddie A. Lucio Middle School	3,182	6,197	8,207
Stell Middle School	5,275	8,845	11,225
A. X. Benavides Elementary	753	3,204	4,838
A. S. Champion Elementary	2,997	5,199	6,667
Egly Elementary	1,595	4,541	6,505
Dr. Ruben Gallegos Elementary	575	2,429	3,665
Hubert R. Hudson Elementary	3,030	5,655	7,405
Mary & Frank Yturria Elementary	1,539	4,032	5,694
Total	**24,524**	**59,267**	**82,429**

Money to support the school library comes from the school and the basic per-student allocation designated by the district. Title VI funds are available for districts through state application. Many Texas districts apply for additional library funds available from TEA through on-line applications. Districts budgeting at least $1.00 per student in library and media expenditures and that have a certified librarian are eligible for reimbursement of up to $.30 for each of these budgeted library funds. The

program administrator reports applying online for but not receiving these funds.

Many districts use the self-evaluations provided by TEA to develop a projection of monies needed to meet the acceptable and exemplary status for all district libraries and then budget funds through departmental requests, long-range plans and grant research and applications.

Recommendation 16:

Create a long-range plan including grant funding and budget reallocations to achieve "acceptable" library collection standards within five years and "exemplary" standards at the conclusion of the plan.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent of Curriculum and Instruction appoints a districtwide committee to explore library collaboration efforts with other groups in the area such as the public library and local universities and possible funding sources.	March 2003
2.	The assistant superintendent of Curriculum and Instruction, the program administrator of Library Media Services and the districtwide committee design a long-range plan to provide "exemplary" collections at all schools.	April - May 2003
3.	The assistant superintendent of Curriculum and Instruction presents the long-range plan and committee findings to the superintendent and Board of Trustees for approval.	June 2003
4.	The superintendent and Board of Trustees approve the plan.	June 2003
5.	The superintendent and assistant superintendent of Curriculum and Instruction begin implementing the plan.	July 2003

FISCAL IMPACT

In order to meet the "acceptable" rating within five years, 24,524 new books or an average of 4,905 books per year should be added to the library collections. In order to reach this goal, it is recommended that BISD budget $78,480 annually (4,905 books x $16 = $78,480). The district should also aggressively pursue grant funding to supplement the acquisition of books each year. At schools where space is limited, the district must investigate a variety of ways to meet the state requirement for books.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Create a long-range plan including grant funding and budget reallocations to achieve "acceptable" library collection standards within five years and "exemplary" standards at the conclusion of the plan.	($78,480)	($78,480)	($78,480)	($78,480)	($78,480)

Chapter 2
EDUCATIONAL SERVICE DELIVERY

D. HEALTH SERVICES

Children cannot perform well academically if they are unhealthy, undernourished, have vision or hearing problems, have serious emotional problems or abuse drugs or alcohol. By preventing or alleviating health problems, coordinated school health programs serve the primary mission of schools. According to the American Cancer Society's Healthy Schools Healthy Kids Initiative, quality school health programs result in the following benefits:

- reduced absenteeism;
- fewer behavior problems in the classroom;
- improved student performance;
- higher test scores;
- more alert students;
- more students with positive attitudes;
- increased health awareness in children's daily lives; and
- more cooperation among parents, community organizations and teachers.

No federal or state law mandates that Texas school districts provide health services for students without disabilities. However, because an estimated 25 percent of Texas children ages 18 and under have no health insurance, a school nurse may be the only health professional they see.

School boards have discretion over which health services are provided and how they are provided. Before 1991, TEA played a major role in monitoring school health programs. Since 1992, however, the Texas Department of Health (TDH) has implemented a School Health Program that provides consultant services to public schools and information and resources to school personnel. TDH also makes competitive grant awards to communities for school-based health centers.

FINDING

The district's health services program demonstrates a high-level of direction and leadership providing students with needed health services both from the district and through associations with community health providers. The district has a health services program administrator and two nurse professionals who ensure that required reports on immunizations and communicable diseases are completed and submitted to local and state health agencies. These professionals also verify the scheduling of

mandatory vision and hearing screening programs, arrange staff development for continuing education for both nurses and aides, monitor implementation of the district's health services program at individual schools and serve as liaison between the district and the community.

BISD assigns one registered nurse (RN) to each elementary, middle school and special populations' schools and two to each high school. In addition, 14 nurse assistants are assigned on a rotating schedule to schools with enrollments exceeding 750 students. The administrator for Health Services and school principals jointly determine the actual number of days a school receives help from a nurse's aide. Two unassigned RNs form a "flex-pool" and are assigned in respond to district emergencies or other needs. During the fall of 2002, one of the flex-pool nurses was assigned to a school until the district hired a replacement.

The ratio of school nurses to students is 1:803 with ratios at individual schools varying from 388 students per school nurse at Clearwater Elementary School and 154 at Lincoln Park Alternative Education center to 1,238 students per school nurse at Filemon B. Vela Middle School. The National Association of School Nurses and Texas Association of School Nurses recommend a maximum ratio of 750 students per school nurse. Overall the district has a total ratio of 634 students per available nurse in the district. BISD nurse caseloads are shown in **Exhibit 2-39**.

Exhibit 2-39
BISD Nurse Caseloads by School
August 2002

School	Number of Nurses	Enrollment	Number of Students per Nurse
A. A. Champion Elementary	1	717	1:717
A. X. Benavides Elementary	1	802	1:802
Bruce Aiken Elementary	1	800	1:800
Burns Elementary	1	983	1:983
Cameron County JJAEP	0	15	N/A
Canales Elementary	1	776	1:776
Central Middle	1	828	1:828
Clearwater Elementary	1	388	1:388
Cromack Elementary	1	834	1:834

Cummings Middle School	1	936	1:936
Del Castillo Elementary	1	556	1:556
Dr. Americo Paredes Elementary	1	638	1:638
Dr. Ruben Gallegos Elementary	1	592	1:592
Egly Elementary	1	968	1:968
El Jardin Elementary	1	951	1:951
Faulk Middle School	1	907	1:907
Filemon B. Ela Middle	1	1,238	1:1,238
Garden Park Elementary	1	820	1:820
Garza Elementary	1	831	1:831
Gonzalez Elementary	1	1,070	1:1,070
Hanna High School	3	2,613	1:871
Hubert R. Hudson Elementary	1	871	1:871
Josephine Castaneda Elementary	1	597	1:597
Lincoln Park Alternative	1	154	1:154
Longoria Elementary	1	458	1:458
Lopez High School	2	1,735	1:868
Mary & Frank Yturria Elementary	1	823	1:823
Morningside Elementary	1	849	1:849
Oliveira Middle School	1	1,204	1:1,204
Pace High School	2	1,952	1:976
Palm Grove Elementary	1	551	1:551
Perez Elementary	1	592	1:592
Perkins Middle	1	1,181	1:1,181
Porter High School	2	1,870	1:935
Putegnat Elementary	1	593	1:593
R. L. Martin Elementary	1	674	1:674
Raul Besteiro Junior Middle School	1	1,101	1:1,101
Resaca Elementary	1*	386	1:386
Rivera High School	2	1,903	1:952

Russell Elementary	1	899	1:899
Senator Eddie A. Lucio Junior Middle School	1	995	1:995
Sharp Elementary	1	496	1:496
Skinner Elementary	1	640	1:640
Southmost Elementary	1	698	1:698
Stell Middle School	1	992	1:992
Vermillion Road Elementary	1	997	1:997
Victoria Heights Elementary	1	635	1:635
Villa Nueva Elementary	1	432	1:432
District Total	**53**	**42,541**	**1:803**

Source: BISD, Health Services Administrator, August 2002; PEIMS 2001-02 enrollment figures.
*Vacant but currently staffed with a flex-pool nurse.

The district has three Campus Care Center Clinics that are located on Clearwater Elementary, Lucio Middle School and Lopez High School campuses. These clinics accept student referrals from school nurses and medical providers. They participate in district-wide employee wellness initiatives, health-related curriculum implementation, training of interdisciplinary teams from all elementary schools and recruiting and training of parent volunteers.

COMMENDATION

BISD uses flexible staffing and programming to meet the health needs of students.

FINDING

BISD uses in-kind services as well as funds from grants to support health services for students in need including donations of time, materials and services. In addition to a substantial commitment to health services for students funded through district categorical funds, $144,694 during the 2001-02 school year, the district seeks community support for students' health needs. The Brownsville Lions Eye Sight Conservation Program donated $6,206 for both exams and eyeglasses and Herman's Wholesale Optical assisted approximately 75 students for a donation of $1,850 and

the Dentists Who Care provide a mobile unit and offer minor dental serves for students. In addition, 59 students received dental vouchers to receive some dental care.

Brownsville Medical Center works with BISD to sponsor Wellness Wednesday, an employee wellness program that provides services at no cost to employees. Approximately 500 invitations are distributed to schools and departments on a monthly basis and are distributed to employees in need. Services provided include glucose and cholesterol testing, blood pressure assessment, body fat content assessment, pulmonary function testing, flu shots and TB testing. Brownsville Medical Center and Columbia Regional Hospital help BISD employees in meeting the district's requirements of having the annual TB test. Brownsville Medical Center donated TB solution and volunteer BISD nurses administered the tests to district employees. Columbia Regional Hospital offered TB tests at a reduced cost. The district provides parent volunteers TB tests free of charge at the Central Health Office since many might have trouble paying for the test.

COMMENDATION

BISD works with members of the community to secure needed health services for students and employees.

Chapter 2
EDUCATIONAL SERVICE DELIVERY

E. GUIDANCE AND COUNSELING

The *1996-2000 Long Range Plan of the State Board of Education for Public School Education* includes the State Board of Education's goal to provide all Texas students with equal access to developmental guidance and counseling. Chapter 21.356 of the Texas Education Code requires the commissioner of education to develop and periodically update a counselor job description in consultation with the state guidance association.

In 1998, TEA published *A Model Developmental Guidance and Counseling Program for Texas Public Schools*. The guide addresses program balance to be achieved by allocating resources to four components of developmental guidance and counseling:

- Guidance Curriculum - planned lessons covering seven areas including self-confidence development, motivation to achieve, decision-making and problem-solving skills and responsible behavior. School counselors may teach all or some of the curriculum through direct instruction or may consult with teachers who integrate the curriculum into the classroom.
- Responsive Services - interventions on behalf of students whose immediate personal concerns or problems put their continued personal social, career and/or educational development at risk. Counselors may meet with individuals or groups of students as indicated in the particular setting.
- Individual Planning - guidance for students as they plan, monitor and manage their own educational, career and personal development. Counselors may perform activities such as conducting group guidance sessions, interpreting standardized test results and consulting with individual students and their parents regarding colleges and financial aid.
- System Support - services and management activities that indirectly benefit students. Counselors may consult with teachers, participate in development of school-based school improvement plans and support parent and community relations efforts.

The guide recommends that school counselors divide their time between these four components depending on the developmental and special needs of the students served with the amount of counselor time devoted to each component to be determined by each district or school. Allocations will vary, but TEA's suggested allocations are shown in **Exhibit 2-40**.

Exhibit 2-40
Texas Education Agency
Recommended Percentage Distribution of
Counselor Services by Level

Service Type	Elementary	Middle School	High School
Guidance Curriculum	35-45%	35-40%	15-25%
Responsive Services	30-40%	30-40%	25-35%
Individual Planning	5-10%	15-25%	25-35%
System Support	10-15%	10-15%	15-20%

Source: TEA, A Model Developmental Guidance and Counseling Program for Texas Public Schools, 1998.

The district monitors counselors' allocation of time through monthly logs prepared by the counselors and submitted in paper format throughout the year. Based on logs for 2001-02, elementary counselors' activities fall within the recommended range of times for services type except for "individual planning" which is slightly higher than the recommended range. Middle school counselors spend less time on the guidance function and slightly more time on system support function activities that indirectly benefit students than is recommended. High school counselors spend more time on individual planning with students and less time than recommended on system support functions (**Exhibit 2-41**).

Exhibit 2-41
BISD Counselor Services Provided
Average Estimated Percentage Distribution

Service Type	Level of Counselors Responding		
	Elementary School	Middle School	High School
Guidance Curriculum	43%	27%	19%
Responsive Services	31%	36%	29%
Individual Planning	15%	23%	45%
System Support	12%	18%	11%

Source: BISD, Guidance and Counseling Department, 2001-02 Monthly Logs, August 2002.

FINDING

BISD has developed and implemented comprehensive curriculum guides including scope and sequences to support the delivery of counseling services to students. The guides, *PreK-5, 6-8 and 9-12 Guidance Program Guides,* recommend activities for each service type by month. They provide a framework for instruction and include an explanation of purpose, student competencies, curriculum strands, skill levels, program design and program balance and suggested materials, as well as correlations with the TEKS, local goals and national standards.

The guides are organized around seven strands or content areas that serve as a foundation for the program. The strands are self-confidence development, motivation to achieve/careers, decision-making, goal setting, planning and problem solving, interpersonal effectiveness/conflict resolution, communication skills, cross-cultural effectiveness/appreciation of diversity and responsible behavior. The guides recommend appropriate activities to help students develop skills in each area.

COMMENDATION

BISD has developed a set of comprehensive curriculum guides to assist counselors as they plan and deliver services to students.

FINDING

Counselor allocations in BISD meet established standards for staffing. In August 2002, BISD reported a total of 134 counselors for an overall counselor to student ratio of 1:318, with three high school counselors designated as "at-risk" counselors, five Career Placement and four migrant counselors. In addition, there are two SAFE (Student Assistance for Furthering Education) counselors assigned to central office, one Bilingual/ESL counselor who serves all five high school campuses, five special education counselors serve the district, three counselors at the Teen Learning Community and two at the Alternative Education Center. **Exhibit 2-42** presents counselor and caseload information for each BISD school.

Exhibit 2-42
BISD Counselors and Caseloads by School
August 2002

School	Number of Counselors	Enrollment	Number of Students per Counselor

A. A. Champion Elementary	2	717	1:359
A. X. Benavides Elementary	2	802	1:401
Bruce Aiken Elementary	2	800	1:400
Burns Elementary	2	983	1:492
Cameron County JJAEP	0	15	N/A
Canales Elementary	2	776	1:388
Central Middle School	3	828	1:276
Clearwater Elementary	1	388	1:388
Cromack Elementary	2	834	1:417
Cummings Middle School	3	936	1:312
Del Castillo Elementary	1.5	556	1:371
Dr. Americo Paredes Elementary	2	638	1:319
Dr. Ruben Gallegos Elementary	2	592	1:296
Dr. Juliette V. Garcia Middle School	3	*	*
Egly Elementary	2	968	1:484
El Jardin Elementary	2	951	1:476
Faulk Middle School	3	907	1:302
Filemon B. Vela Middle School	3	1,238	1:413
Garden Park Elementary	2	820	1:410
Garza Elementary	2	831	1:416
Gonzalez Elementary	3	1,070	1:357
Hanna High School	8	2,613	1:327
Hubert R. Hudson Elementary	2	871	1:436
Josephine Castaneda Elementary	1.5	597	1:398
Lincoln Park Alternative	1	154	1:154
Longoria Elementary	1	458	1:458
Lopez High School	6	1,735	1:289
Mary & Frank Yturria Elementary	2	823	1:412
Morningside Elementary	2	849	1:425
Oliveira Middle School	3	1,204	1:401

Pace High School	5	1,952	1:390
Palm Grove Elementary	1	551	1:367
Perez Elementary	1.5	592	1:395
Perkins Middle School	3	1,181	1:394
Porter High School	7	1,870	1:267
Putegnat Elementary	1.5	593	1:395
R. L. Martin Elementary	2	674	1:337
Raul Besteiro Junior Middle	3	1,101	1:367
Resaca Elementary	1	386	1:386
Rivera High School	7	1,903	1:238
Russell Elementary	2	899	1:450
Senator Eddie A. Lucio Junior Middle	3	995	1:332
Sharp Elementary	1	496	1:496
Skinner Elementary	1.5	640	1:427
Southmost Elementary	2	698	1:349
Stell Middle	3	992	1:331
Vermillion Road Elementary	3	997	1:332
Victoria Heights Elementary	1.5	635	1:423
Villa Nueva Elementary	1	432	1:432
District Total	**118**	**42,541**	**1:361**

Source: BISD Guidance and Counseling Department, August 2002; PEIMS 2001-02 enrollment figures, excluding students enrolled in dropout recovery and disciplinary alternative education programs.
* Opened 2002-03. No students identified in August 2002.

In August 2002, the Texas Comptroller's office published a study on public school counseling services. Based on data from the report, BISD has the lowest overall counselor to student ratio, the lowest counselor to student ratio at the elementary and middle school levels and the second lowest ratio at the high school level among peer districts (**Exhibit 2-43**).

Exhibit 2-43
Comparison of BISD and Peer Districts Counseling Programs
2001-02

District	Enrollment	Counselors	Total Students per Counselor	Elem. Students per Counselor	Middle School Students per Counselor	High School Students per Counselor	Total Schools
Brownsville	**42,541**	**134.4**	**317**	**401**	**272**	**279**	**48**
Corpus Christi	39,383	108.0	365	483	411	281	60
Laredo	23,188	61.3	378	526	342	247	27
North East	53,030	149.6	354	415	338	292	56
Plano	48,944	122.7	399	536	357	315	58
Ysleta	46,742	76.4	612	1,071	556	346	53

Source: Texas Comptroller's office, Guiding Our Children Toward Success: How Texas School Counselors Spend Their Time, August 2002.

The American School Counselor Association recommends an ideal ratio of one counselor for each 100 students and a maximum ratio of one counselor for each 300 students. The Texas School Counselor Association recommends a ratio of one counselor for each 350 students. BISD's staffing ratio for elementary counselors is one counselor for 500 or fewer students, 1.5 counselors for 501 to 750 students, two counselors for 751 to 1,000 students and three counselors for 1,001 or more students. All middle and high schools are assigned one counselor per grade level with an additional counselor assigned if enrollment is over 2,250. All schools meet the minimum established in the district's staffing guidelines and six schools exceed. The district exceeds state recommendations.

COMMENDATION

BISD provides counselor allocations that meet established staffing standards.

FINDING

As of August 2002, BISD's Master Schedule Timeline had not been implemented causing many high school students to have errors in their class schedules, and causing counselors to spend a large portion of their

time with administrative scheduling duties. Counselors said they were concerned that they had spent so many hours building schedules and making changes to ensure students were in the appropriate classes in the third week of school. Counselors additionally said they were unable to focus their efforts on counseling and guidance activities during the beginning and end of the year because so much of their time was spent with schedule creation and maintenance.

During interviews in early September 2002, district personnel indicated that a large number of schedule changes were still being made. The district is on the accelerated block schedule and lost class time accumulates quickly, putting students behind in their work. The lead counselor, Guidance and Counseling administrator and a staff liaison in the Computer Services department identified implementation of the Master Schedule Timeline as the major problem. Although one goal of the 2001-02 Master Schedule Timeline states, "All students will have a completed schedule for the 2002-03 school year," it did not happen. The district's timeline called for the first run of the student schedules to occur by May 1, 2002; 88 percent of students' schedules to be complete by June 14; and completion rates to be included as a part of principals' end-of-year check-out procedures. None of these steps were met. Additionally, counselors were unable to focus their efforts on counseling and guidance activities because so much of their time was spent with schedule creation and maintenance.

The appropriate area assistant superintendents were to assure 88-90 percent master schedule completion as a part of check out procedures, yet none of the schools had the master schedule in place at that level when counselors reported back to campus in August. In some cases, it was reported that principals responsible for the school master schedules left data-entry clerks to complete a task for which they had neither the expertise nor the authority. The district computer services office was to be a part of the sign-off process but was never contacted by either principals or assistant superintendents to confirm the level of completion of master schedules. According to the counseling staff, a large number of students experienced a difficult beginning of school with many incomplete schedules requiring many schedule changes.

Further complicating the problem, not all counselors assigned to high schools are actively involved in scheduling students even when students may be missing class time because of scheduling problems. Counselors not assisting included Career Placement Officers who are certified counselors funded by Career and Technology funds and some at risk counselors.

Some districts use "specialist" counselors or designated clerks at the high school level specifically assigned to students for schedule evaluations.

Other districts offer specific training to principals, counselors and clerks regarding course scheduling. Some districts using computerized schedules partner scheduling staff members with a district computer specialist to maximize available professionals understanding the curricular and technological aspects of student scheduling.

Some districts ensure that counselors maximize their available time with guidance and counseling activities by initiating board policy specifying the use of counselor time.

Recommendation 17:

Fully implement the Master Schedule Timeline and create board policy specifying the use of counselor time.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent of Curriculum and Instruction, working with the area superintendents, draft board policy specifying use of counselor's time and present to the interim superintendent and board for review.	March - April 2003
2.	The assistant superintendent of Curriculum and Instruction ensures full implementation of the Master Schedule Timeline and reports implementation progress to the interim superintendent.	March - May 2003
3.	The interim superintendent approves the recommended board policy.	May 2003
4.	The interim superintendent submits the recommended board policy to the board for review and approval.	June 2003 and Ongoing
5.	The board approves the policy	June 2003
6.	The assistant superintendent of Curriculum and Instruction monitors implementation and provides regularly scheduled status reports to the interim superintendent and board to ensure all students have accurate completed schedules on the first day of school and that counselors adhere to the policy regarding use of time.	July 2003 and Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 2
EDUCATIONAL SERVICE DELIVERY

F. SPECIAL EDUCATION

The Individuals with Disabilities Education Act (IDEA) requires free, appropriate public education for all children with disabilities. This law, also designed to protect children and parents in educational decision making, requires the district to develop an individualized education plan (IEP) for each child with a disability.

In 1997, Public Law 101-15 re-authorized IDEA at the federal level. The revised law states that the IEP must be clearly aligned with the education received by children in regular classrooms and that the IEP preparation process must include regular education teachers. The law also requires that students with disabilities be included in state and district assessment programs and performance goals.

To serve the multiple needs of all students with disabilities and comply with IDEA requirements, an effective special education program should implement the following practices as enumerated in the 1997 amendments to IDEA:

- prep-referral intervention in regular education when a student experiences an academic problem in regular education, an intervention can and should solve the problem. If the intervention does not produce positive results, the student should be referred to special education;
- referral to special education for evaluation referring a student to special education requires an official, written request supported by documentation. Documentation should include an explanation of the steps taken in regular education to address the student's problem before the referral;
- Full Individual Evaluation after student referral, the district must provide a Full and Individual Evaluation, which requires parental permission. The district must complete the evaluation within 60 days from the date of referral;
- initial placement through an Admission, Review and Dismissal (ARD) committee meeting after the evaluation is complete, an ARD committee meets to discuss the evaluation results with the parents. The ARD committee decides if the student qualifies for special education services in one of 13 federal special education categories. If so, the ARD committee must develop an individualized educational plan for the student within another 30 days;

- provision of educational services and supports according to a written individualized education plan (IEP) the IEP developed by the ARD committee includes information about which classes the student will take and the amount of time the student will spend in regular and special education, including resource room, speech therapy or counseling. The IEP also specifies the amount of time that the student receives any related services such as occupational therapy, physical therapy, counseling or adaptive physical education;
- annual program review - each year after a student's initial qualification and placement, an ARD committee conducts a review to ensure that the student's program is appropriate. A new IEP is developed annually based on the student's progress toward set goals;
- three-year reevaluation - every three years, the student receives an full individual evaluation. The ARD committee meets to discuss the reevaluation results and decides whether or not the student continues to qualify for special education in the same category, or needs an IEP to support academic progress; and
- dismissal from the special education program - if and when the ARD committee decides that a student may not need special education for success in school, it can request an evaluation to determine if the student still meets the eligibility criteria. Based on the testing results, the student can then be dismissed from special education.

Special education instructional arrangements are based on the individual needs and individualized education programs of eligible students receiving special education services. Students who receive all of their instruction and related services in a regular classroom are considered to be in a mainstream instructional setting. Additional instructional arrangements include but are not limited to a resource room where the student is removed from the regular classroom less than 50 percent of the day or a self-contained class where the student is removed from the regular classroom more than 50 percent of the day. If a student's disability is so severe that satisfactory education cannot take place for any part of the school day in a regular classroom, he or she may be served in a separate "self-contained" classroom. In addition, a school district must be prepared to provide a more restrictive setting such as a day treatment program, or even residential treatment placements if the student's needs and educational program requires a more restrictive placement.

BISD provides special education services to 4,948 students with disabilities, or 11.6 percent of the district's student population. The district offers a full range of special education services including mainstream, mainstream with modifications, content mastery, resource, self-contained,

homebound, vocational adjustment classes, alternative education program, juvenile justice alternative education program, Preschool Program for Children with Disabilities, adapted physical education and speech therapy.

During 2001-02, BISD budgeted instructional operating expenditures for special education totaled $19,755,491, or 12.9 percent of the district's total instructional operating expenditures. The percent of BISD students enrolled in special education was third lowest among peer districts and lower than that in the state but higher than the percentage in Region 1. Budgeted instructional operating expenditures for special education was also the third lowest among peer districts as were the district's expenditures expressed as a percent of total expenditures (**Exhibit 2-44**).

Exhibit 2-44
2001-02 Special Education
Budgeted Instructional Operating Expenditures
BISD, Peer Districts, Region 1 and the State

District	Number Students Enrolled	Percent of Total Students Enrolled	Budgeted Special Education Expenditures	Percent of Total Expenditures
North East	8,674	16.4%	$39,170,144	18.8%
Plano	5,346	10.9%	$35,179,200	17.5%
Ysleta	5,296	11.3%	$23,572,211	15.2%
Brownsville	**4,948**	**11.6%**	**$19,755,491**	**12.9%**
Corpus Christi	5,771	14.7%	$17,173,745	12.8%
Laredo	3,202	13.8%	$9,674,571	12.3%
Region 1	**32,237**	**10.2%**	**$108,720,383**	**10.1%**
State	**485,010**	**11.7%**	**$1,841,869,962**	**12.6%**

Source: TEA, AEIS, 2001-02.

BISD offers special education services at all schools, including its discipline alternative education program. Related services for students with disabilities include counseling; occupational and physical therapies; school health and social work services; assistive technology services such as recordings, reading machines, tape recordings, computers and other devices that help students learn; orientation and mobility training; and transportation.

The BISD Special Education Department is staffed with personnel having current and appropriate credentials and certifications. The department

employs 300.5 teachers as well as other special education professionals including diagnosticians, licensed specialists in school psychology and a psychologist, occupational and physical therapists, adaptive physical education and homebound teachers, speech pathologists and a transition specialist and teachers for the visually impaired. The district also employs special education teacher assistants and paraprofessionals. The district ratio of special education teachers to students is 1:16.5, the third lowest among peer districts and lower than the ratio in Region 1 and statewide (**Exhibit 2-45**).

Exhibit 2-45
2001-02 Special Education Teachers
BISD, Peer Districts, Region 1 and the State

District	Number of Teachers	Number of Students Enrolled	Teacher to Student Ratio
Plano	509.5	5,346	1:10.5
North East	566.1	8,674	1:15.3
Brownsville	**300.5**	**4,948**	**1:16.5**
Ysleta	281.4	5,296	1:18.8
Laredo	166.8	3,202	1:19.2
Corpus Christi	258.8	5,771	1:22.3
Region 1	**1,798.8**	**32,237**	**1:17.9**
State	**28,287.8**	**485,010**	**1:17.1**

Source: TEA, AEIS, 2001-02.

The director of Special Education and other professional staff all serve BISD schools. School-based special education staff members, such as licensed specialists in school psychology, educational diagnosticians and special education teachers, provide training to assist regular education teachers with lesson modifications, positive behavioral intervention strategies and obtaining assistive devices as needed. They also work with teachers to ensure that modifications are correctly implemented in the classroom.

BISD uses a pre-referral process for considering placement in special education programs. A request for pre-referral consideration is submitted to a school Student/Teacher Assistance and Review Team. The responsibility of the team is to monitor students' academic achievement and behavior and to assist teachers with strategies aimed at maximizing the students' performance. Teachers submit documentation to the team of

students' academic/behavior problems, a checklist showing modifications that have been previously implemented and, if the problem is academic, work samples showing any modifications or strategies that have been implemented. After considering the information presented, the committee makes recommendations such as attending tutorials, receiving content mastery as needed, taking part in the Accelerated Reader Program, observation by a behavior specialist, receiving counseling services, taking part in a behavioral management plan or referral for a full and individual evaluation.

To ensure the least restrictive environment for each student, district personnel also consider supplementary aids and services or modifications that can be offered in regular education. All students receive appropriate curricular modifications and services. Admission, review and dismissal committees composed of parents and professional staff determines program eligibility and participation, educational plans and placement in and dismissal from special education. District personnel also develop individualized education plans, as required by law, for every student with a disability.

BISD measures the effectiveness and impact of the special education program through an annual comprehensive needs assessment that uses information from parent and teacher surveys, the community advisory committee, a parent forum, the special education teacher advisory committee and a transition task force. Based on information gathered from the needs assessment, the district has implemented a number of initiatives including creating a summer enrichment program for students in the life skills program, increasing the number of educational diagnosticians and redefining the role of the special education supervisors.

The BISD Assessment, Research and Evaluation Department conducted a special education evaluation in June 2002. As a result of that evaluation, the special education department developed a strategic plan to address the gap between the special education and non-special education students on the new state testing program, the TAKS, and the performance of special education students at the beginner level on the Reading Proficiency Test in English.

FINDING

BISD offers its special education staff extensive training opportunities through its own staff, Region 1 personnel and other individuals, agencies and providers. Topics offered include behavior management and positive behavior intervention strategies, writing individual education and behavior plans, special education law, inclusion, social skills and classroom management, assistive technology and co-teaching and the measurement

of student progress. Staff members attend national and statewide conferences and meetings, such as the state conference on autism and the Texas Educational Diagnostician Association (TEDA) conference.

BISD pays registration and travel expenses for parents of special education students who attend conferences concerning their children's disabilities. Parents have attended local meetings, state conferences and have accompanied district staff on visitations in other districts. Parents have also visited along with district staff programs in the Richardson ISD. The district encourages active parent involvement on the parent advisory committee that meets monthly with the special education director and supervisory staff. The district also provides annual training and written materials to parents and regular teachers on the BISD Department of Special Education Operating Guidelines.

COMMENDATION

BISD provides its special education personnel and parents of students with disabilities with extensive staff development opportunities.

FINDING

BISD provides an inclusion program at two of the district's eight elementary schools with both a Preschool Program for Children with Disabilities and a Pre-K class, designed to enhance educational service and social interactions for three, four and five-year old students with disabilities. These students share a classroom with four-year-old non-disabled students and are served cooperatively by a special education teacher, a Pre-K teacher, two special education funded teaching assistants and one bilingual education funded paraprofessional.

Speech pathology, occupational therapy, physical therapy and adapted physical education services are all available when deemed appropriate and as specified in any individualized education plans or federal regulated documentation. Teachers use innovative strategies and share ideas with other participating teachers that help personalize the school experience for all students by involving them in creative artistic processes, developing their learning skills, heightening their sensibilities and fostering higher communication levels.

Teachers received training related to the inclusive arrangement through Region 1 in two programs: *High Scope*, an early childhood approach to organizing the classroom and *Early Learning Together*, an innovate approach to including preschool children with disabilities with other Pre-K students. A team consisting of the principal, the special education teacher and the Pre-K teacher attended training as a school team in order to

facilitate effective implementation of the program. Teachers involved in the program and others at these schools said that students in the program were academically and socially transitioning between grade levels better with the implemented program.

The inclusive Preschool Program for Children with Disabilities programs have been successful as evidenced by TEA's recognition of Burns Elementary and Perez Elementary receipt of the Promising Practice Award for 2001-02. These two schools were originally chosen based upon the district's assessment of need at those campuses and with input from central and campus staff. The district expressed an interest in expanding the program.

COMMENDATION

BISD provides an inclusion program to enhance academic and social opportunities for preschool students with disabilities.

FINDING

BISD's Special Education Assessment Procedures, updated in 2001-02, require educational diagnosticians to attend all initial, annual and three-year reevaluation admission, review and dismissal meetings for all special education students. Additionally, BISD is not completing all required assessments of students referred to special education by its educational diagnosticians within the prescribed 60 days from initial referral. BISD received a citation on a 2000-01 district effectiveness and compliance visit from TEA for this issue of noncompliance. The educational diagnosticians said the time required to attend all admission, review and dismissal meetings is the reason they have fallen behind in conducting required student evaluations. As a result, BISD spent $159,486 in overtime payments and contracted services to diagnosticians for educational evaluations in 2000-01. Several special education administrators said they were addressing this issue and one Special Education director specifically identified the district's requirement of educational diagnosticians to attend all annual admission, review and dismissal meetings a factor in both overtime payments and required assessment noncompliance.

The district is required by law to conduct a full individual evaluation before the initial provision of special education and related services to a child with a disability begin. The initial evaluation must be completed within 60 calendar days from the date of the initial referral. The district must also conduct a reevaluation of each child, if conditions warrant a reevaluation, or if the child's parent or teacher requests a reevaluation prior to the federal requirement of at least once every three years. The full

individual evaluation is reviewed at the time of the admission, review and dismissal meeting for the initial and three-year reevaluation.

According to federal regulations, the individuals who must attend an individualized education plan/admission, review and dismissal meeting include:

- a parent of the child;
- at least one regular education teacher of the child;
- at least one special education teacher or professional staff providing special education services to the child;
- a representative of the district who is qualified to provide; or supervise the provision of; specially designed instruction to meet the unique needs of children with disabilities;
- an individual who can interpret the instructional implications of evaluation results; who may be present at an IEP/ARD meeting as described above;
- other individuals who have knowledge or special expertise regarding the child; including related services personnel such as the school nurse when the student has identified health needs; and
- the child, if appropriate.

The special education teacher must attend the admission, review and dismissal meeting in order to review the student's individualized education plan, modifications and TAAS or the state developed alternative assessment requirements, schedule of classes, assistive technology and learning competencies with the admission, review and dismissal committee.

Educational diagnosticians are not legally required to attend admission, review and dismissal meetings. Each of the 4,948 students in special education requires an annual admission, review and dismissal meeting. Many districts do not require educational diagnosticians to attend all annual admission, review and dismissal meetings in order to provide additional time during regular working hours to complete all required evaluations without an added overtime or contracted service fee in this area. Educational diagnosticians in these districts, however, continue to attend initial and three-year reevaluation admission, review and dismissal meetings and consider annual meeting attendance on an individualized basis in order to review and explain the assessment reports required as a part of many of these evaluations to attending staff, students and parents.

Recommendation 18:

Revise annual admission, review and dismissal meeting attendance requirements and monitor educational diagnosticians overtime expenditures.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The director of Special Education requests input from districtwide staff including school principals, educational diagnosticians and special education teachers regarding attendance at admission, review and dismissal meetings and to review overtime payments to educational diagnosticians.	March 2003 and Ongoing
2.	The director of Special Education prepares a revised attendance requirement for optional attendance by educational diagnosticians at all admission, review and dismissal meetings to the area superintendent and interim superintendent for review and approval.	March - May 2003
3.	The area superintendent and interim superintendent approve the revised recommendation submitted by the director of Special Education.	June 2003
4.	The area supervisor advises the director of Special Education to inform all principals and staff of the decision.	July 2003
5.	Principals ensure all educational diagnosticians and appropriate staff are informed of the decision and begin continuously monitoring all overtime payments to educational diagnosticians for attendance at admission, review and dismissal meetings.	August 2003 and Ongoing
6.	Principals continually monitor overtime payments to educational diagnosticians and make scheduled reports to the director of Special Education.	Ongoing

FISCAL IMPACT

Due to the amount of time diagnosticians were required to spend in annual admission, review and dismissal meetings, $159,486 was expended in 2000-01 for overtime services for testing purposes. The district should expect a conservative reduction of 50 percent of these expenditures or $79,743 as the educational diagnosticians collaboratively decide with administrators and special education staff to reduce their attendance at all of these meetings during the first year of implementation and then the full amount, or $159,486 the second year of implementation and annually thereafter.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08

Revise annual admission, review and dismissal meeting attendance requirements and monitor educational diagnosticians overtime expenditures.	$79,743	$159,486	$159,486	$159,486	$159,486

Chapter 2
EDUCATIONAL SERVICE DELIVERY

G. STATE COMPENSATORY EDUCATION/TITLE I

BISD uses compensatory education funds to provide special support for students that are at risk of dropping out and students who are not performing at grade level. Texas began to fund compensatory programs in 1975. In 1997, Section 42.152 of the TEC was amended to include reporting and auditing systems covering the appropriate use of compensatory education allotment funds. Senate Bill 1873 requires state compensatory education (SCE) funds, like federal Title I funds, to be supplemental in nature. That is, these funds are to be added to the regular program but cannot take the place or supplant regular funds.

SCE fund rules allow considerable flexibility in identifying students and creating successful programs. Senate Bill 702 changed the state criteria for identifying students at-risk of dropping out of school and requires districts to use student performance for designing and implementing appropriate compensatory, intensive or accelerated instructional programs so these students will perform at grade level at the end of the following school year. This allows districts to use local criteria for identifying at-risk students but the criteria have to be board approved. Senate Bill 702 also requires each district to evaluate and document the effectiveness of the state compensatory education program in reducing any disparity in performance between at-risk and regular students. It also restricts the amount of SCE funds that a district can use to fund basic services for disciplinary alternative education programs, an amount that cannot exceed 18 percent of the total amount of SCE funds allotted to the district. Senate Bill 702 requires that districts integrate SCE budgetary appropriations into the district and school planning process, identify in their district and campus improvement plans the designated funding source, the amount of SCE funds budgeted and the number of full-time equivalent (FTE) staff funded by SCE appropriations. These changes became effective at the beginning of the 2001-02 school year.

According to Senate Bill 702, a student is at-risk of dropping out if the student meets any of the following criteria:

- is a Pre-K through grade 3 student who did not perform satisfactorily on a readiness test or an assessment instrument administered during the current school year;
- did not perform satisfactorily on an assessment instrument (TAAS);
- is a student of limited English proficiency;

- is a student in grades 7 through 12 who did not maintain an average equivalent to 70 out of 100 in two or more subjects in the foundation curriculum during a semester in the current or preceding school year;
- was not advanced from one grade level to the next for two or more school years;
- has been placed in an alternative education program during the preceding or current school year;
- has been expelled during the preceding or current school year;
- is currently on parole, probation, deferred prosecution or other conditional release;
- was previously reported through PEIMS to have dropped out of school;
- is in the custody or care of the Department of Protective and Regulatory Services or has, during the current school year, been referred to the department by a school official, officer of the juvenile court or a law enforcement official;
- is pregnant or is a parent;
- is homeless; or
- was a resident of a residential placement facility during the preceding school year or currently is a resident of a residential placement facility in the district.

In 2001-02, 28,382 students, or approximately two-thirds of BISD's student population of 42,541, were classified as at-risk. BISD's 66.7 percent of at-risk students is the second highest among its peers and significantly higher than the state's 40.1 percent average (**Exhibit 2-46**).

Exhibit 2-46
Number and Percentage of At-Risk Students
BISD, Peer Districts and the State
2001-02

District	Number of At-Risk Students	Percent of At-Risk Students
Brownsville	**28,382**	**66.7%**
Ysleta	20,262	43.3%
North East	20,125	38.0%
Corpus Christi	18,236	46.3%
Laredo	17,281	74.5%
Plano	6,703	13.7%
State	**1,664,473**	**40.1%**

The BISD SCE Office consists of a program administrator, a compliance officer and four clerks. BISD's SCE budget for 2002-03 is $17.2 million. BISD ranked fourth among its peer districts in SCE expenditures per student (**Exhibit 2-47**) and has the highest percent of SCE expenditures as percent of total budget among its peers. Its SCE budget as percent of total budget is lower than the regional average but higher than the state average. BISD is in the middle position among its peers in the percent of SCE teachers. BISD's percent of SCE teachers is lower than the regional and state averages.

Exhibit 2-47
BISD, Peer Districts, Region 1 and the State
State Compensatory Education Expenditures per Student
2001-02

District	Budget Expenditures	Percent of Total Budget	Amount Per Student	Compensatory Education Teachers (FTEs)	Percent of Total FTEs
Brownsville	**$10,554,445**	**6.9%**	**$372**	**35.7**	**1.2%**
Ysleta	$9,724,034	6.3%	$480	4.8	0.2%
Laredo	$7,528,449	9.6%	$436	16.9	1.2%
North East	$6,956,599	3.3%	$346	38.2	1.1%
Plano	$6,795,972	3.4%	$1,014	97.5	2.8%
Corpus Christi	$5,979,222	4.4%	$328	67.2	2.8%
Region 1**	**$94,139,551**	**8.8%**	**$477**	**349.8**	**1.7%**
State	**$931,021,213**	**6.4%**	**$559**	**8,778.8**	**3.1%**

BISD at-risk students made progress in all areas in their performance on TAAS (**Exhibit 2-48**).

Exhibit 2-48
BISD TAAS Performance of At-Risk Students
1997-98 through 2000-01

TAAS	1997-98	1998-99	1999-2000	2000-01
Reading	60.4%	68.2%	67.0%	70.3%
Mathematics	61.1%	72.6%	73.1%	77.8%
Writing	69.0%	73.9%	71.8%	75.7%
Science	58.5%	71.8%	71.6%	80.8%
Social Studies	36.2%	43.2%	38.2%	49.7%

Source: BISD, Assessment, Research & Evaluation Department, DEC Chart of Expectations, October 2001.

BISD programs funded with SCE funds are listed in **Exhibit 2-49**.

Exhibit 2-49
BISD State Compensatory Education Funded Programs

Program	Program Description	2001-02 SCE Funding
Alternative Education Center (AEC)	AEC is a disciplinary alternative education school designated to house BISD students who have demonstrated an inability to perform well or comply with the district's rules	$1,554,491
Teen Learning Community (TLC)	TLC is a school designated as a disciplinary alternative education program for students expelled for Texas Education Code (TEC) Section 37.700 (b), (c) and (f) violations but who are not eligible to be enrolled in the Cameron County Juvenile Justice Alternative Education Program. TLC endeavors to return those students to mainstream education.	$1,373,651
Teen Parenting Accelerated Program (TPAP)	TPAP aims to provide pregnant or parenting teens the opportunity to continue their education and acquire a high school diploma at an accelerated rate. Lincoln Park School offers TPAP as an alternative education school of choice for students in grades 6-12.	$1,136,054

Coca Cola Valued Youth	Program provides assistance to students in grades 7 and 8 who are at risk of dropping out by placing them as paid tutors at elementary schools.	$150,000
Community In Schools (CIS)	CIS's objective is to assist in decreasing the drop out rate by providing tutorial and counseling assistance to students during the school day.	$60,000
Homeless Youth Project (HYP)	HYP is a cooperative effort between BISD, community homeless shelters, the battered women shelter, Department of Human Services, Boys and Girls Clubs of Brownsville, Good Neighbor Settlement House and the City of Brownsville. The purpose of HYP is to ensure that homeless youth and youth at risk of becoming homeless will have access to all available educational, physical, nutritional and mental health services that BISD provides. HYP also provides essential school supplies, textbooks and clothing.	$62,840
Prevention Efforts Advancing Character Education (PEACE)	PEACE is a program aimed at developing the understanding of grade 5 students about the importance of drug and character education. The program, implemented by the Brownsville Police Department, was discontinued in 2002-03.	$100,000

Source: BISD, State Compensatory Education, 2001-02.

In addition, SCE funds are also used to support the following efforts:

- the Students in an Alternative Return to Success (STARS) program;
- summer school programs;
- tutorial sessions;
- facilitators and deans of instruction at individual schools;
- special education aides;
- truant officers;
- staff development sessions; and
- supplies and materials for use with at-risk students.

TEA distributes Title I, Part A funds of the Elementary and Secondary Education Act (ESEA) to school districts to provide additional resources to help improve instruction in high-poverty schools and to ensure that poor and minority children have the same opportunity as other children to meet

state academic standards. Funds are distributed based on the number of economically disadvantaged students in a school. Economically disadvantaged students are typically those who are eligible for free or reduced priced lunch or breakfast. The students served are selected based on educational need, not economic status. The law allows a school to be designated as a Title I, Part A school-wide program if 50 percent or more of students at the school, or in the attendance zone, are low income. BISD is a designated school wide Title I, Part A program. The *No Child Left Behind Act* of 2001 (NCLB) re-authorized ESEA and mandates that school districts use Title I funds for activities that scientifically-based research suggests will be most effective in helping all students meet state standards. Under Title I, Part A districts are required to coordinate and integrate Title I, Part A, services with other educational services to increase program effectiveness, eliminate duplication and reduce fragmentation of instructional programs.

In 2001-02, 92.8 percent of BISD students were classified as economically disadvantaged. BISD has the second largest percent of economically disadvantaged students among the peer districts. BISD's percent of economically disadvantaged students is also higher than the percent in Region 1 and the state averages (**Exhibit 2-50**).

Exhibit 2-50
Economically Disadvantaged Enrollment
BISD, Peer Districts, Region 1 and the State
2001-02

District	Number	Percent
Laredo	22,309	96.2%
Brownsville	**39,499**	**92.8%**
Ysleta	36,399	77.9%
Corpus Christi	22,356	56.8%
North East	18,541	35.0%
Plano	5,092	10.4%
Region 1	**265,450**	**84.4%**
State	**2,093,511**	**50.5%**

Source: TEA, AEIS, 2001-02.

BISD uses Title I, Part A funds to fund programs at all schools (**Exhibit 2-51**). It co-funds several programs with Title I, Part C funds.

Exhibit 2-51
BISD Title I Programs
2002-03

Program	Description	Location
Three-Year Old Program (Title I, Parts A and C)	Program is designed to provide appropriate developmental activities to three-year olds to provide them with a solid foundation to succeed in school, prevent remediation and dropout.	12 elementary schools
Basic Skills Instructional Assistance Program	Provide additional reinforcement or individualization to students with academic deficiencies in the areas of reading, math and language arts.	All elementary schools
Help One Student To Succeed (HOSTS)	HOSTS is a mentoring program in language arts which matches students with trained business and community volunteers.	2 schools (Burns, Gonzalez)
School wide Programs	Implement reform strategies that increase the amount and quality of learning time and help provide a high quality curriculum to all children.	All 50 schools
Title I Elementary Instructional Programs (Title I, Parts A and C)	Programs supplement instruction provided in the regular classroom through reading and math sites, Title I technology, funding of teachers, TAAS computer aides, library aides, nurses, parent liaisons and parent centers.	Elementary schools
Secondary Instructional Programs (Title I, Parts A and C)	The programs focus on reading and math and emphasize TAAS/TAKS objectives. These include regular programs, extended day classes that allow high school students to earn additional credit toward graduation and day tutorials for migrant students.	14 secondary schools

Source: BISD, Title I Federal Programs, 2002-03.

Economically disadvantaged students in BISD made progress on the TAAS in all areas with the exception of Science (**Exhibit 2-52**). BISD students' performance on TAAS Science in 2001-02 was lower than their performance in 2000-01.

Exhibit 2-53
TAAS Performance

BISD Economically Disadvantaged Students
1997-98 through 2001-02

TAAS	1997-98	1998-99	1999-2000	2000-01	2001-02*
Reading	68.8%	75.9%	76.9%	80.5%	85.4%
Mathematics	69.3%	79.6%	81.2%	85.4%	89.8%
Writing	74.3%	79.7%	80.6%	83.3%	83.6%
Science	68.5%	79.4%	80.9%	87.1%	77.9%
Social Studies	47.4%	55.8%	54.6%	63.4%	75.8%

Source: BISD, Assessment, Research & Evaluation Department, DEC Chart of Expectations. October 2001, and TEA, AEIS, 2001-02.

The *Improving America's Schools Act* of 1994 authorizes state education agencies to coordinate education programs for migrant students. Section 1301 of Title I, Part C of the Act (Public Law 103-382) states that migrant funds must support education programs to help reduce education disruptions that occur from moving repeatedly and ensures that migrant students receive the education that best fits their needs.

To meet the needs of migratory children, the Texas Migrant Education Program has established seven areas of focus: (1) identification and recruitment, (2) New Generation System for Migrant Student Records Transfer, (3) migrant services coordination, (4) early childhood education, (5) graduation enhancement, (6) secondary credit accrual and exchange and (7) parent involvement. The Office of Migrant Education in the U.S. Department of Education provides grants through the TEA to districts based on the enrollment of migrant students in the district.

BISD's Migrant Office has 13 staff members headed by a facilitator for Migrant Services who reports to the administrator of Federal Programs. The office has six recruiters responsible for identifying students who are eligible to participate in the migrant education program, a data entry clerk, two clerks and a custodian. The office also has a specialist and a computer operator assigned to the New Generation System, an Internet-based system for the transfer of migrant student education and health records among a consortium of participating states. BISD received $2.0 million in migrant funds in 2001-02 and is eligible to receive $2.2 million in Title I, Part C funds in 2002-03.

In 2001-02, there were 4,287 migrant students in the BISD, or 10.1 percent of the district's total enrollment. BISD schools with the highest

percent of migrant students were Gallegos Elementary with 24.3 percent and Palm Grove Elementary with 23.8 percent. Schools with the lowest percent of migrant students were Sharp Elementary with 2.4 percent and Benavides Elementary with 2.5 percent. The number and percent of migrant students enrolled in each of the district's schools is indicated in **Exhibit 2-53**.

Exhibit 2-53
BISD Student Enrollment by School: Total and Migrant Students
2001-02

School	Enrollment	Migrant Students	Percent of Migrant Students
A. A. Champion Elementary	717	82	11.4%
A. X. Benavides Elementary	802	20	2.5%
Bruce Aiken Elementary	800	148	18.5%
Burns Elementary	983	132	13.4%
Cameron County JJAEP	15	3	20.0%
Canales Elementary	776	73	9.4%
Central Middle Sc hool	828	73	8.8%
Clearwater Elementary	388	39	10.0%
Cromack Elementary	834	68	8.1%
Cummings Middle School	936	71	7.6%
Del Castillo Elementary	556	72	12.9%
Dr. Americo Paredes Elementary	638	60	9.4%
Dr. Ruben Gallegos Elementary	592	144	24.3%
Egly Elementary	968	53	5.5%
El Jardin Elementary	951	111	11.7%
Faulk Middle School	907	83	9.2%
Filemon B. Vela Middle School	1,238	140	11.3%
Garden Park Elementary	820	102	12.4%
Garza Elementary	831	137	16.5%
Gonzalez Elementary	1,070	127	11.9%

Hanna High School	2,613	170	6.5%
Hubert R. Hudson Elementary	871	30	3.4%
Josephine Castaneda Elementary	597	70	11.7%
Lincoln Park Alternative	154	21	13.6%
Longoria Elementary	458	20	4.4%
Lopez High School	1,735	269	15.5%
Mary & Frank Yturria Elementary	823	56	6.8%
Morningside Elementary	849	109	12.8%
Oliveira Middle	1,204	54	4.5%
Pace High School	1,952	137	7.0%
Palm Grove Elementary	551	131	23.8%
Perez Elementary	592	46	7.8%
Perkins Middle School	1,181	117	9.9%
Porter High School	1,870	137	7.3%
Putegnat Elementary	593	58	9.8%
R L Martin Elementary	674	24	3.6%
Raul Besteiro Junior Middle School	1,101	193	17.5%
Resaca Elementary	386	25	6.5%
Rivera High School	1,903	206	10.8%
Russell Elementary	899	51	5.7%
Senator Eddie A. Lucio Junior Middle School	995	138	13.9%
Sharp Elementary	496	12	2.4%
Skinner Elementary	640	37	5.8%
Southmost Elementary	698	135	19.3%
Stell Middle School	992	62	6.2%
Vermillion Road Elementary	997	148	14.8%
Victoria Heights Elementary	635	42	6.6%
Villa Nueva Elementary	432	51	11.8%
Total	**42,541**	**4,287**	**10.1%**

Exhibit 2-54 shows the percent of migrant students and all students who passed TAAS by grade level and TAAS section. BISD migrant students' performance on the TAAS lagged behind the performance of all students in every grade level and subject area.

Exhibit 2-54
BISD Migrant and All Students TAAS Performance
2001-02

	Migrant Students	All Students
Grade 3		
Reading	76	80
Math	78	85
All Tests	70	75
Grade 4		
Reading	84	89
Math	89	93
Writing	82	87
All Tests	72	80
Grade 5		
Reading	83	90
Math	92	96
All Tests	82	89
Grade 6		
Reading	70	76
Math	82	88
All Tests	64	73
Grade 7		
Reading	68	81
Math	74	84
All Tests	61	74

Grade 8		
Reading	88	91
Math	85	89
Writing	62	76
Science	85	89
Social Studies	68	76
All Tests	60	71
Grade 10		
Reading	91	95
Math	94	95
Writing	79	89
All Tests	81	90

Source: BISD, Department of Assessment, Research and Evaluation, October 2002.

FINDING

BISD's migrant education program has been recognized in Texas and nationally as a trend-setting, exemplary program that is well-organized and managed. The Migrant Education Office works closely with Title I, Part A, social service and health agencies offering more than 30 services, adult education programs, local colleges and the Texas Workforce Commission. The office has developed a Migrant Plan of Action addressing each of the seven areas of focus established by the Texas Migrant Education Program. The plan identifies goals, defines improvement strategies and details action steps along with the person responsible, resources, timeline and evaluation procedures. The Migrant Education Office also maintains a monthly plan of action, identifying all activities that are scheduled for each month. The BISD migrant program is extensive, providing services for migrant students at all educational levels (**Exhibit 2-55**).

Exhibit 2-55
BISD Migrant Education Services
2002-03

Level	Instructional	Support
Elementary Schools	• Migrant resource classes at four schools with the highest	• Basic school supplies (1 time

	migrant population (110 or more migrant students) - Saturday Academics (Reading is Fundamental)	each fall/spring) - Student clothing (1 time each fall/spring) - Referrals for services to different agencies for the families
Middle Schools	- Migrant tutorial classes - Extended day program - API courses - Project SMART (Summer Migrant Accessing Resources through Technology) - Migrant secondary summer program	- Migrant school clerk - Basic school supplies (1 time each fall/spring) - Student clothing (1 time each fall/spring) - Referrals for services to different agencies for the families
High Schools	- Migrant resource room/lab with a certified teacher - Migrant tutorial classes - Extended day program - Sure Score SAT Academy (Saturdays) - API courses - Project SMART - Migrant secondary summer program - University of Texas correspondence courses	- Migrant counselor - Migrant school clerk - Basic school supplies (1 time each fall/spring) - Student clothing (1 time each fall/spring) - Referrals for services to different agencies for the families

	correspondence courses	
	• Credit by exam	
	• Referrals to GED with BISD or HEP	
	• Assistance with College Assistance Migrant Program (CAMP) applications	

Source: BISD, Title I, Part C, Migrant Education Program Handbook, 2002-03.

At the secondary level, BISD provides migrant students with multiple ways to accrue credit toward graduation. BISD offers migrant tutorial classes at all five high schools and at several middle schools. The purpose of the classes is to assist students who enter late or who withdraw early with incomplete work to earn course credit. Secondary schools also offer extended day programs through non-credit tutorials, for-credit tutorials or a combination of the two. Migrant students can also get credit through American Preparatory Institute (API) courses at both the middle and high school levels. These courses accelerate the progress of students who have fallen behind in accumulating credits required for graduation. BISD migrant students can also get credit through correspondence courses offered by the University of Texas at Austin Migrant Student Program. All courses have been approved by TEA, are aligned with TEKS and count toward graduation.

The University of Texas credit-by-exam program offers another option for accumulating credits in a wide range of curricular areas. BISD also offers Project SMART, Summer Migrants Accessing Resources through Technology, a distance-learning program sponsored by TEA. BISD also pays tuition for secondary migrant students to attend regular summer school classes. In 2001-02, 93.4 percent of migrant students graduated, exceeding the state standard of 90 percent.

The BISD migrant education program received a large number of regional and state awards for its identification and recruitment efforts. Awards received included:

- University of Texas at Austin Migrant Student program - First Place in 2002 for Completions in Credit by Exam;
- 2001 Recruitment Team of the Year over 5001 Category;
- State Identification and Recruitment Cluster Workshop;

- 1999 Region I 10 percent Challenge contribution in identification and recruitment of migrant students);
- University of Texas at Austin Migrant Student Program First Place for Completions in 1997-98 Credit by Exam Over 100 Enrollments;
- 1998 First Place All State Team, TEA Migrant Education Program 1997-98in recognition for extraordinary excellence in the identification and recruitment of migrant students;
- 1998First Team All State Identification and Recruitment, First Place Winner 4000-4999, Texas Migrant Education Conference;
- 2000 and 2001 All State First Place, in recognition for extraordinary excellence in the identification and recruitment of migrant students; and
- 1998First Team All State Identification and Recruitment Texas Migrant Education Conference.

BISD migrant students also received a number of awards. In 2001, a migrant student was the class valedictorian at the Simon Rivera High School. The student also received a 2001 Conference Honoree award.

BISD recruiters use laptop computers with proprietary software when visiting migrant families. The laptops allow the migrant recruiters to view migrant family information on site. Recruiters can update information on Certificates of Eligibility without having to call or travel to the Migrant Education Office to verify information, thereby saving time and costs.

The office also generates a variety of reports that allow recruiters and staff to follow families more closely. The Migrant Education Office has used a GEO Code System since 1995 for locating families. The GEO Code System is the geographical code used by the City of Brownsville Engineering Department to help identify locations throughout the city and was first used in the district by the BISD Transportation Department in planning bus routes. The system aligns recruitment efforts by clusters and determines, based on the number of migrant families residing within the GEO codes of each cluster, how many recruiters to assign to a cluster. The result is a savings to the district in both mileage and travel time. It also allows recruiters to establish a closer relationship with families resulting in the identification of more families.

BISD tracks all migrant students. The district prepares a list of its migrant students and, when a student leaves, each is given a "Red Bag" containing the student's TAAS scores, report card, a list of medical needs and a list of instructional needs. The bag also contains a letter to the receiving school asking the school to return the bag with current and any new information when the student leaves that school.

COMMENDATION

BISD has developed and initiated a program designed to assist migrant students achieve high school graduation.

FINDING

BISD's SCE Office and the Federal Programs Office ensure the timely use of funds by schools through a projected spending targets timeline. TEA cited BISD for spending less than the required 85 percent of its SCE funds to supplement its regular education programs for 1996-97, 1997-98 and 1998-99. To ensure that the spending requirement for programs and services for at-risk students is met, BISD added a compliance officer to oversee and monitor the SCE funds. The SCE Office established a deadline for spending or encumbering all SCE funds and developed a yearly projected spending-targets calendar with targeted spending percentages for SCE funds, similar to the calendar that the Federal Programs Office developed. On a month-by-month basis, the calendar indicates the percent of SCE funds to be spent or encumbered and the specific date for updating school expenditures. For example, the 2002-03 calendar calls for spending 40 percent of SCE funds by the end of October, 50 percent by the end of November, 60 percent by the end of December, 75 percent by the end of January and 95 percent by the end of February. SCE spending is monitored through monthly reports showing the percent balance of each school's allotment and the reports are provided to each administrator. The calendar has contributed to ensuring the timely expenditure of funds. In 1999-2000, BISD spent 91.8 percent of its SCE funds; in 2000-01, it spent 93.9 percent.

The Federal Programs Office developed the projected spending-targets calendar to monitor Title I and other federal funds. The Federal Programs Office recommends that schools spend the majority of their allocation at the beginning of the year so that there is sufficient time for goods and services acquired to have an impact on student performance. The Federal Programs Office made this decision after reviewing expenditure reports of Exemplary and Recognized BISD schools and finding a positive correlation between the early use of funds and academic success. The Federal Programs Office prepares monthly expenditure reports for each school showing the percentage of funds spent and percentage remaining. The Office notifies principals about their spending status. The Federal Programs administrator also notifies area superintendents about any school that does not comply with the recommended timeline.

COMMENDATION

BISD ensures the timely expenditure of its SCE and federal funds through the development of an annual spending calendar and the monitoring of expenditures through monthly reports.

Chapter 2
EDUCATIONAL SERVICE DELIVERY

H. BILINGUAL EDUCATION/ENGLISH AS A SECOND LANGUAGE (PART 1)

Chapter 29 of the TEC requires that every Texas student who is identified as limited English proficient be provided a full opportunity to participate in a bilingual or English as a second language (ESL) program. Limited English proficiency students are defined as those whose primary language is something other than English and whose English language proficiency limits their participation in an English-language academic environment.

All school districts with 20 or more limited English proficiency students in the same grade level are required to offer bilingual/ESL or an alternative language program. Schools must provide bilingual education in pre-kindergarten through the elementary grades. Districts must provide bilingual education, ESL instruction or other transitional language instruction approved by TEA in the post-elementary grades through grade 8. For students in grades 9 through 12, schools are required only to provide instruction in ESL.

School districts are required to identify limited English proficiency students and provide bilingual or ESL programs as an integral part of their regular educational programs. They must hire certified teaching personnel to ensure that these students have full educational opportunities.

The education of limited English proficiency students is an important task for Texas public schools. Nearly 500,000 or 12.5 percent of Texas students were enrolled in bilingual or ESL programs in 1999-2000. According to the *Policy Research Report,* "Of the 666,961 students added to the Texas public education system between 1987-88 and 1997-98, more than 60 percent were students receiving bilingual education/English as a second language services." The *Report* notes that the number of Hispanic students rose by 45 percent in the last decade, more than double the growth rate of the total student population. The State Board of Education's *Long-Range Plan for Public Education 2001-06* states "enrollment in the state's bilingual education program is projected to increase by 22 percent over the next five years."

BISD uses the Transitional Bilingual Program model at grades PK-5 and an English-as-a-second-language (ESL) program at grades 6-12. The Transitional Bilingual Program model provides students an opportunity to master English language skills. It divides students into three categories based on their English proficiency. Limited English proficient (LEP)

students are instructed initially in their primary language and learn through their native language the same concepts and skills taught in the English-speaking classroom. As students become more proficient in English, they make a transition to English. At the beginners' level, instruction is 80 percent in Spanish and 20 percent in English. At the intermediate level, instruction is 50 percent in Spanish and 50 percent in English. At the advanced level, instruction is 20 percent in Spanish and 80 percent in English.

The purpose of the BISD bilingual/ESL program is to assist the learning ability of LEP students in grade PK through 12 and enhance their use of the English language. Recent immigrants receive ESL instruction at the middle and high school levels through self-contained classes in the first year, a combination of ESL and regular English during the second year and regular English curriculum with an ESL certified teacher in the third year. At the high school level, BISD offers special newcomer courses for immigrants followed by English as a Second Oral Language (ESOL). BISD also began implementing in 2001-02 a Dual-Language program model in grades PK-K at five schools. A dual language program provides an equal amount of instruction in English and Spanish to a classroom of LEP and non-LEP students.

Students are identified as limited English proficient based on the Home Language Survey that is completed for each student during registration. Any student whose home language is not English is assessed using the Oral Language Proficiency Test. Of BISD's 18,649 LEP students, 16,816 were in bilingual/ESL programs in 2001-02. BISD has the second highest percent of LEP students among peer districts and the largest difference between the percent of LEP students and the percent of students in bilingual/ESL programs (**Exhibit 2-56**). District personnel indicated that the difference was due mainly to parents' refusal to enroll their children in bilingual/ESL programs rather than to screening.

Exhibit 2-56
Hispanic, Bilingual/ESL and LEP Participation
BISD, Peer Districts, Region 1 and the State
2001-02

District	Percent Hispanic	Percent Bilingual/ ESL	Percent LEP	LEP vs. Bilingual Difference
Laredo	99.1%	58.6%	58.9%	0.3%
Brownsville	**97.6%**	**39.5%**	**43.8%**	**4.3%**
Ysleta	88.7%	22.2%	24.6%	2.4%
Corpus Christi	71.7%	7.1%	8.0%	0.9%

North East	39.6%	3.3%	3.9%	0.6%
Plano	10.8%	7.0%	8.6%	1.6%
Region 1	**95.9%**	**35.6%**	**38.0%**	**2.4%**
State	**41.7%**	**13.1%**	**14.5%**	**1.4%**

Source: TEA, AEIS, 2001-02.

BISD's Language Proficiency Assessment Committee (LPAC) determines students' placement, monitors progress and oversees the reclassification of LEP students. The committee consists of a campus administrator, a teacher certified in bilingual education assigned to the bilingual program, a teacher certified in ESL assigned to the ESL program, a professional transitional language educator, a parent of a bilingual/ESL child who is not a district employee and an ARD administrator. At the secondary level, a counselor may replace the certified ESL teacher. The committees meet about 10 times a year.

The bilingual/ESL administrator coordinates bilingual/ESL education. The BISD Bilingual/ESL Department staff includes three curriculum specialists and six lead teachers. Four lead teachers are assigned to schools, one coordinates activities for Title VII and one focuses on recent immigrants. The department also has a high school ESL counselor, two secretaries and a receptionist. BISD employs five testers who process all tests, verify scores and assist with LAS administration at the secondary level. In 2001-02, BISD employed 826 bilingual teachers and 112 ESL teachers. The testers and teachers report to the principals.

In 2001-02, 39.5 percent of all BISD students participated in the bilingual/ESL program. BISD has the largest number of students enrolled in bilingual/ESL programs and the second largest percent of bilingual/ESL students among the peer districts. In 2001-02, BISD served 18,649 LEP students, of whom 90.2 percent were enrolled in bilingual/ESL programs. Budgeted expenditures for bilingual/ESL programs were approximately $3.4 million, or 2.2 percent of total budgeted expenditures. BISD had the third highest percent of budgeted bilingual/ESL expenditures and per student expenditures. BISD's percent of SCE expenditures and per student expenditures were below the regional and state averages. **Exhibit 2-57** compares bilingual/ESL enrollment and expenditure data for BISD, its peer districts, Region 1 and the state.

Exhibit 2-57
Bilingual/ESL per Student Expenditure
BISD, Peer Districts, Region 1 and the State
2001-02

District	Students Enrolled in Bilingual ESL	Percent of Total Enrollment	Budgeted Expenditures	Percent of Budgeted Expenditures	Per Student Expenditures
Brownsville	**16,816**	**39.5%**	**$3,397,544**	**2.2%**	**$202**
Laredo	13,584	58.6%	$2,475,498	3.2%	$182
Ysleta	10,364	22.2%	$1,594,510	1.0%	$154
Plano	3,432	7.0%	$9,745,745	4.8%	$2,840
Corpus Christi	2,790	7.1%	$271,246	0.2%	$97
North East	1,769	3.3%	$1,012,846	0.5%	$573
Region 1	**111,952**	**35.6%**	**$55,610,015**	**5.2%**	**$497**
State	**542,312**	**13.1%**	**$625,092,391**	**4.3%**	**$1,153**

Source: TEA, AEIS, 2001-02.

In 2001-02, compared with peer districts, BISD had the highest percent of bilingual/ESL teachers and the lowest teacher-student ratio. BISD's percent of bilingual/ESL teachers was higher than the Region 1 and state averages. BISD's bilingual/ESL teacher-student ratio was lower than the average ratio in Region 1 and the state (**Exhibit 2-58**).

Exhibit 2-58
Bilingual/ESL Teacher to Student Ratio
BISD, Peer Districts, Region 1 and the State
2001-02

District	Students Enrolled in Bilingual/ESL	Bilingual/ESL Teachers	Percent of Bilingual/ESL Teachers to Total Teachers	Teacher to Student Ratio
Brownsville	**16,816**	**815.9**	**28.0%**	**1:21**
Laredo	13,584	350.3	24.2%	1:39
Ysleta	10,364	517.0	17.3%	1:20
Plano	3,432	141.3	4.0%	1:24
Corpus Christi	2,790	0.0	0.0%	N/A
North East	1,769	61.7	1.7%	1:29

Region 1	**111,952**	**4,737.1**	**22.9%**	**1:24**
State	**542,312**	**21,989.5**	**7.8%**	**1:25**

The TAAS performance of LEP students and students in BISD bilingual and ESL programs is lower than the performance of students who are not members of these groups (**Exhibit 2-59**). There are large gaps in performance at all grade levels but the gaps are especially large in grades 6 and 7 and in the area of writing.

Exhibit 2-59
TAAS Performance Comparison
2001-02

	TAAS Pass Rates					
	LEP Students	**Non-LEP Students**	**Bilingual Students**	**Non-Bilingual Students**	**ESL Students**	**Non-ESL Students**
Grade 3						
Reading	71	92	70	90	75	82
Math	78	92	78	90	79	85
All Tests	64	89	63	85	66	77
Grade 4						
Reading	69	96	67	95	72	90
Math	81	97	81	96	69	94
Writing	65	94	65	93	69	87
All Tests	51	90	49	89	55	81
Grade 5						
Reading	64	96	65	95	64	91
Math	86	98	87	98	76	97
All Tests	65	95	65	94	58	90
Grade 6						
Reading	33	85	--	77	33	85
Math	65	94	--	90	65	94

All Tests	28	83	--	75	28	82
Grade 7						
Reading	37	91	--	81	35	90
Math	51	91	--	84	50	90
All Tests	28	86	--	75	26	84
Grade 8						
Reading	61	97	--	91	57	97
Math	62	95	--	89	61	94
Writing	32	85	--	76	30	84
Science	60	95	--	89	59	95
Social Studies	40	84	--	76	38	83
All Tests	24	82	--	72	21	81
Grade 10						
Reading	77	99	--	95	75	99
Math	83	98	--	96	82	98
Writing	58	96	--	89	53	95
All Tests	52	94	--	86	48	93

Source: TAAS Results Spring 2001-02 Summary Report, 2001-02.

The performance of LEP, bilingual and ESL students increased between 2000-01 and 2001-02 in reading and math but declined in writing at all grades levels where TAAS writing is administered (**Exhibit 2-60**). District program administrators explained the lower performance of bilingual/ESL students on TAAS writing in 2001-02 is due to the decrease in the number of exemptions and the lack of district emphasis on writing.

Exhibit 2-60
Academic Progress of LEP, Bilingual and ESL Students
2000-01 through 2001-02

	LEPs			Bilingual			ESL		
	2000-01	2001-02	Gain (Loss)	2000-01	2001-02	Gain (Loss)	2000-01	2001-02	Gain (Loss)

Grade 3									
Reading	64	71	7	61	70	9	73	75	2
Math	69	78	11	68	78	10	67	79	12
All Tests	55	64	9	53	63	10	56	66	10
Grade 4									
Reading	57	69	12	55	67	12	68	72	4
Math	73	81	8	73	81	8	73	69	(4)
Writing	71	65	(6)	69	65	(5)	83	69	(14)
All Tests	47	51	4	45	49	4	58	55	(3)
Grade 5									
Reading	49	64	15	48	65	17	38	64	26
Math	78	86	8	78	87	9	75	76	1
All Tests	48	65	17	48	65	17	46	58	8
Grade 6									
Reading	24	33	9	*	*	*	24	33	9
Math	56	65	9	*	*	*	56	65	9
All Tests	22	28	6	*	*	*	22	28	6
Grade 7									
Reading	35	37	2	*	*	*	34	35	1
Math	51	51	0	*	*	*	51	50	(1)
All Tests	26	28	2	*	*	*	25	26	1
Grade 8									
Reading	54	61	7	*	*	*	52	57	5
Math	64	62	(2)	*	*	*	64	61	(3)
Writing	37	32	(5)	*	*	*	33	30	(3)
Science	32	60	28	*	*	*	27	59	32
Social Studies	12	40	18	*	*	*	9	38	29
All Tests	25	24	(1)	*	*	*	23	21	(2)
Grade 10									

Reading	61	77	16	*	*	*	57	75	18
Math	82	83	1	*	*	*	84	82	(2)
Writing	71	58	(13)	*	*	*	66	53	(13)
All Tests	47	52	5	*	*	*	42	48	(6)

Source: TEA, AEIS, 2001-02.
* Not Applicable.

FINDING

BISD is not consistently monitoring the bilingual program for effectiveness using student scores and administrative, staff and teacher input. The percent of students in the elementary bilingual program passing the written language proficiency test and the oral test is low. BISD uses the Transitional Bilingual Program model in grades PK-5. The Transitional Bilingual Program model divides students into beginners, intermediate and advanced groups and provides instruction using different ratios of English and Spanish depending on students' levels of English language mastery. LPACs determine the language of assessment based on the language of instruction. LPAC decisions and assessment data show that many of the BISD schools use a very early transition model assessing students who are at the beginners or intermediate level in English.

TEA's DEC review of the district's Bilingual/ESL program indicated that the BISD exit criteria did not comply with the state's exit guidelines. BISD used a ranking of the 40th percentile in language arts on the Stanford 9 or on TAAS and language arts grades to exit students in grades 2 and 9 and for grades 3-8 and 10, a TLI score of 70 or above on the reading section or a score of 1500 or above on the writing section. State exit guidelines require that students demonstrate TAAS mastery with a score of 70 percent or higher in reading and writing in addition to an oral and written language proficiency test (OLPT/WLPT) score both in the student's primary language and in English. BISD revised its exit criteria in response to the DEC review in the fall of 2002 and began implementation in spring 2002. The revised exit criteria are presented in **Exhibit 2- 61**.

Exhibit 2-61
BISD Bilingual/ESOL Program Exit Criteria
Fall 2002

Grades	Exit Criteria
Grade 2	• Score at or above the 40th percentile on both the reading

	and language sections of the MAT-8 test. • Score a level 4 or 5 on the Oral Language Proficiency test in both English and Spanish. • Score 80 percent or above on the writing section of the LAS Assessment Scales Reading/Writing Test in both English and Spanish.
Grades 3-5	• Score 70 TLI or above on the reading and writing sections of TAKS (grade 4). • Score a level 4 or 5 on the English Oral Language Proficiency and Spanish Oral Language Proficiency. • Score 80 percent or above on the LAS English writing and LAS Spanish writing.
Grades 6 and 7	• Score 70 TLI (Texas Learning Index) or above on the reading section of the English TAKS. • Score a level 4 or 5 on the English Oral Language Proficiency Test. • Score 80 percent or above on the LAS English Writing section.
Grade 8 and Exit Level	• Score 70 TLI or above on the reading and writing sections of the English TAKS. • Score a level 4 or 5 on the English Oral Language Proficiency Test. • Score 80 percent or above on the LAS English writing.

Source: BISD, Bilingual/ESOL Program Exit Criteria, Fall 2002.

Chapter 2
EDUCATIONAL SERVICE DELIVERY

H. BILINGUAL EDUCATION/ENGLISH AS A SECOND LANGUAGE (PART 2)

BISD began implementing the new exit criteria in the spring of 2002. The percent of Bilingual/ESL students exited from the program in 2001-02 decreased as a result of the new exit criteria, as shown in **Exhibit 2-62**. The decrease in the percent of students exiting the Bilingual/ESL program was largest at the elementary level.

Exhibit 2-62
Percent Students Exiting Bilingual/ESL Program
1999-2000 through 2001-02

School	1999-2000		2000-01		2001-02	
	Number of LEP Students	**Percent Exiting**	**Number of LEP Students**	**Percent Exiting**	**Number of LEP Students**	**Percent Exiting**
A. A. Champion Elementary	N/A*	N/A*	N/A*	N/A*	457	1%
A. X. Benavides Elementary	382	19%	424	14%	399	3%
Bruce Aiken Elementary	538	16%	561	15%	525	1%
Burns Elementary	974	15%	943	13%	591	2%
Canales Elementary	535	11%	554	10%	585	2%
Central Middle	343	13%	341	9%	343	7%
Clearwater Elementary	490	14%	431	12%	264	0%
Cromack Elementary	555	21%	418	11%	482	1%
Cummings	309	8%	304	11%	321	4%

Middle					
Del Castillo Elementary	386	13%	401	14%	355	2%
Dr. Americo Paredes Elementary	N/A*	N/A*	N/A*	N/A*	345	11%
Dr. Ruben Gallegos Elementary	N/A*	N/A*	N/A*	N/A*	399	2%
Egly Elementary	538	21%	471	13%	461	3%
El Jardin Elementary	852	17%	831	9%	672	1%
Faulk Middle	264	10%	301	12%	288	6%
Filemon B. Vela Middle	243	16%	252	14%	264	13%
Garden Park Elementary	430	15%	413	9%	517	3%
Garza Elementary	584	12%	620	8%	610	1%
Gonzalez Elementary	524	18%	574	14%	658	1%
Hanna High	265	22%	285	12%	262	12%
Hubert R. Hudson Elementary	412	16%	444	10%	392	3%
Josephine Castaneda Elementary	315	10%	363	27%	390	5%
Longoria Elementary	305	18%	254	15%	289	4%
Lopez High School	389	22%	408	20%	397	13%
Mary & Frank Yturria Elementary	428	19%	444	18%	428	4%
Morningside	575	21%	526	14%	506	5%

Elementary						
Oliveira Middle	204	21%	224	16%	238	4%
Pace High School	343	22%	315	16%	330	12%
Palm Grove Elementary	310	20%	357	10%	379	0%
Perez Elementary	316	17%	288	17%	279	4%
Perkins Middle	321	8%	317	10%	304	11%
Porter High School	394	21%	361	17%	405	9%
Putegnat Elementary	478	14%	496	8%	496	1%
R. L. Martin Elementary	264	19%	259	14%	288	5%
Raul Besteiro Junior Middle	382	15%	396	9%	382	4%
Resaca Elementary	271	25%	248	10%	250	3%
Rivera High School	347	22%	363	15%	392	13%
Russell Elementary	285	24%	287	17%	404	3%
Sen. Eddie A. Lucio Junior Middle	317	12%	309	17%	306	6%
Sharp Elementary	248	14%	249	19%	270	9%
Skinner Elementary	436	15%	420	6%	467	4%
Southmost Elementary	485	13%	532	8%	490	4%
Stell Middle	193	15%	190	12%	223	2%
Vermillion	1,000	11%	1,035	10%	751	3%

Road Elementary					
Victoria Heights Elementary	465	14%	449	12%	440	3%
Villa Nueva Elementary	196	16%	199	7%	267	1%

Source: BISD, Bilingual/ESL Department, October 1, 2002.
* N/A - school was not in existence.

At the elementary level, Bilingual/ESL students are required to score a level 4 or 5 on the English Oral Language Proficiency and Spanish Oral Language Proficiency and score 80 percent or above on the LAS English writing and LAS Spanish writing. A small percent of students passed the English and Spanish Oral LAS and a minute percent of students passed the English and Spanish writing tests (**Exhibit 2-63**).

Exhibit 2-63
Percent Students Passing English and Spanish Writing
2001-02

School	2001-02					
	Number of Bilingual/ ESL Students Tested	Percent Passed English Oral LAS	Percent Passed Spanish Oral LAS	Percent Passed English Writing	Percent Passed Spanish Writing	Percent Exiting
A. A. Champion Elementary	230	10%	21%	0%	0%	1%
A. X. Benavides Elementary	189	32%	48%	7%	7%	3%
Bruce Aiken Elementary	264	15%	30%	2%	1%	1%
Burns Elementary	288	34%	51%	6%	2%	2%
Canales Elementary	293	19%	51%	3%	3%	2%

School						
Central Middle						7%
Clearwater Elementary	136	26%	51%	3%	1%	0%
Cromack Elementary	228	20%	37%	4%	3%	1%
Cummings Middle						4%
Del Castillo Elementary	183	14%	33%	5%	4%	2%
Dr. Americo Paredes Elementary	164	27%	43%	9%	5%	11%
Dr. Ruben Gallegos Elementary	187	14%	33%	3%	1%	2%
Egly Elementary	196	28%	49%	7%	5%	3%
El Jardin Elementary	315	25%	34%	3%	1%	1%
Faulk Middle	*	*	*	*	*	6%
Filemon B. Vela Middle	*	*	*	*	*	13%
Garden Park Elementary	276	38%	54%	7%	6%	3%
Garza Elementary	317	13%	38%	1%	0%	1%
Gonzalez Elementary	351	28%	42%	2%	0%	1%
Hanna High	*	*	*	*	*	12%
Hubert R. Hudson Elementary	195	42%	44%	6%	0%	3%
Josephine Castaneda Elementary	201	23%	36%	10%	8%	5%
Longoria Elementary	163	34%	61%	1%	1%	4%

School						
Lopez High School	*	*	*	*	*	13%
Mary & Frank Yturria Elementary	213	47%	52%	9%	4%	4%
Morningside Elementary	257	28%	32%	9%	6%	5%
Oliveira Middle	*	*	*	*	*	4%
Pace High School	*	*	*	*	*	12%
Palm Grove Elementary	199	32%	36%	1%	1%	0%
Perez Elementary	131	50%	56%	12%	5%	4%
Perkins Middle	*	*	*	*	*	11%
Porter High School	*	*	*	*	*	9%
Putegnat Elementary	251	14%	72%	3%	2%	1%
R. L. Martin Elementary	132	33%	47%	8%	9%	5%
Raul Besteiro Junior Middle	*	*	*	*	*	4%
Resaca Elementary	134	29%	51%	19%	0%	3%
Rivera High School	*	*	*	*	*	13%
Russell Elementary	189	16%	44%	3%	2%	3%
Sen. Eddie A. Lucio, Junior Middle	*	*	*	*	*	6%
Sharp Elementary	116	20%	43%	17%	14%	9%
Skinner	224	22%	64%	9%	8%	4%

Elementary						
Southmost Elementary	260	25%	45%	12%	13%	4%
Stell Middle	*	*	*	*	*	2%
Vermillion Road Elementary	401	15%	34%	2%	2%	3%
Victoria Heights Elementary	220	30%	75%	2%	9%	3%
Villa Nueva Elementary	124	16%	18%	0%	2%	1%

Source: BISD, Bilingual/ESL Department, October 1, 2002.
* No Test Data Available.

Many districts use student scores and teacher surveys and focus groups to provide feedback regarding bilingual program success. Based upon these results, administrators in these districts effect necessary program changes and continually monitor the program for improvements or necessary adjustments.

Recommendation 19:

Monitor bilingual student pass rates to implement program changes.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The assistant superintendent for Curriculum and Instruction, PreK-12 Curriculum administrator and Bilingual/ESL administrator meet with principals to review the implementation of the bilingual program and student performance on Bilingual/ESL exit tests.	March 2003
2.	The Bilingual/ESL administrator prepares a plan with guidelines for the implementation of the program and preparation of students for the Bilingual/ESL oral and writing tests.	April 2003
3.	The PreK-12 Curriculum administrator and Bilingual/ESL administrator review the plan with school principals and Bilingual/ESL teachers.	May 2003

4.	The Bilingual/ESL administrator trains Bilingual/ESL teachers in program implementation.	August 2003
5.	The PreK-12 Curriculum administrator and Bilingual/ESL administrator monitor the implementation of the program and review student test data on a continual basis implementing necessary changes.	August 2003 - May 2004 and Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

BISD has a disproportionately high percent of LEP students in special education. Approximately 65 percent of special education students in BISD in both 2000-01 and 2001-02 were LEP students (**Exhibit 2-64**). The fall 2001 DEC report recommended that the district examine its intervention and continuity of instructional services for all LEP students prior to referral to special education.

Exhibit 2-64
BISD LEP and Non-LEP Students in Special Education Program
2001-02

Population	Number in Special Education Program	Percent in Special Education Program	Percent of Program LEPs to Total LEP Population
2001-02			
LEP	3,258	64.8%	17.8%
Non-LEP	1,767	35.2%	
2000-01			
LEP	3,178	64.7%	17.3%
Non-LEP	1,732	35.3%	

Source: BISD Bilingual Program Evaluation, Assessment, Research & Evaluation Department, September 2001 and July 2002.

In response to the DEC report recommendation, BISD developed several strategies for reducing the number of LEP students in special education programs (**Exhibit 2-65**).

Exhibit 2-65
BISD Proposed Strategies to Reduce Overrepresentation of LEPs in
Special Education
2002-03

- Provide intensive training to diagnosticians, speech therapists, campus administrators and school STAR team leaders on characteristics of second language learners.
- Disaggregate data by school on LEP students identified for special education.
- Purchase additional Spanish testing instruments and provide training on use of these instruments for diagnosticians and speech therapists.
- Develop, implement and monitor implementation of guidelines for referral of LEP students to special education.
- Provide training for general education instructional staff on issues related to referral of LEP students to special education.
- Collect data monthly on the number of LEP student referrals per school and use the data to drive instructional decisions.

Source: TEA, District Effectiveness and Compliance Process, Corrective Action Report, March 11, 2002.

Socorro ISD (SISD) minimized referrals to special education using organized and systematic pre-referral strategies including the establishment of committees designed to help remediate students' academic or behavioral problems. SISD schedules and conducts pre-referral meetings on a regular basis with counselors, regular and special education teachers and administrators in attendance. Teachers are required to document their pre-referral interventions. SISD also identifies and provides services to students with disabilities who do not qualify for special education services under Section 504 of the Vocational Rehabilitation Act. District personnel provide ongoing training on identification and keep records of training to guarantee a consistent level of expertise among staff members. This approach helps reduce the cost of special education by preventing unnecessary assessments and long-term placements in special education.

Recommendation 20:

Monitor implementation of strategies to reduce number of limited English proficient students in special education and evaluate their effectiveness.

The BISD Bilingual/ESL Department jointly with the Special Education Department should review current procedures for pre-referral and identification of LEP students for special education services, the assessment procedures used and the training the district provides to administrators and staff involved in referring LEP students. Based on results of the review, theBilingual/ESL Department should develop a plan jointly with the Special Education Department and the district's Assessment, Research & Evaluation Department to ensure that the strategies the district proposed for reducing the number of LEPs in special education are implemented. The plan should include monitoring procedures and periodic evaluations.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The administrators of Bilingual/ESL and Special Education Departments review district procedures for pre-referral intervention and remediation and assessment/testing procedures for LEP students.	March 2003
2.	The administrators of the Bilingual/ESL, Special Education and Assessment, Research and Evaluation Departments jointly develop an action plan that includes strategies for reducing the number of LEP students placed in special education, a schedule for staff training and a timeline for monitoring and evaluation of the process.	April 2003
3.	The administrators of the Bilingual/ESL and Special Education Departments train administrators, diagnosticians and regular, Bilingual/ESL and special education teachers in the new procedures and assessments.	April - May 2003
4.	The administrator of the Bilingual/ESL Department monitors implementation of strategies and staff training.	April - May 2003 and Ongoing
5.	The administrator of Assessment, Research and Evaluation evaluates the effectiveness of the strategies and prepares a report to the administrators of the Bilingual/ESL and Special Education Departments.	December 2003 - June 2004
6.	The administrators of the Bilingual/ESL and Special Education Departments refine the procedures and staff training based on the monitoring and evaluation results.	January - July 2004

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The district has a low percent of LEP students in G/T programs. Only 1.2 and 1.1 percent of the district LEP population was identified as gifted and talented in 2000-01 and 2001-02, respectively, compared with a state average of 5.8 percent (**Exhibit 2-66**).

Exhibit 2-66
BISD LEP and Non-LEP Students in G/T Program
2001-02

Population	Number in G/T Program	Percent in G/T Program	Percent of Program LEPs to Total LEP Population
2001-02			
LEP	210	9.1%	1.1%
Non-LEP	2,110	90.9%	NA
2000-01			
LEP	216	8.6%	1.2%
Non-LEP	2,293	91.4%	NA

Source: BISD, Bilingual Program Evaluation, Assessment, Research and Evaluation Department, September 2001 and July 2002.

The DEC report recommended that BISD review its nomination, assessment, screening and identification procedures to provide G/T opportunities to LEP students. The DEC report also recommended that BISD modify its G/T nomination timeline from the beginning of the year when teachers are not sufficiently familiar with students' capabilities and provide training to its staff on characteristics of special needs G/T students. In response to recommendations in the DEC report, BISD developed several strategies, effective in 2002-03, to actively recruit bilingual/ESL students into the G/T program. The proposed strategies are indicated in **Exhibit 2-67**.

Exhibit 2-67
BISD Proposed Strategies for Recruiting Bilingual/ESL Students to G/T
2002-03

- Ensure that recent immigrants are nominated based on information

> - provided by the parents or documentation from the home country.
> - Assign personnel proficient in Spanish to administer the identification assessment instrument to bilingual students.
> - Provide annual training to LPAC members on G/T characteristics and G/T nomination procedures for speaking students.
> - Publish the findings of the district's Dual-Language/Project SOL model.
> - Conduct a public awareness campaign that promotes G/T for Bilingual/ESL students.

Source: District Effectiveness and Compliance Process, Corrective Action Report, March 11, 2002.

Fort Worth ISD developed and implemented a new nomination, screening and identification process in 1999-2000 that increased the number of ethnic and minority students in its G/T programs. The goal of the new procedures was to provide more opportunities to ethnic and language minority students to demonstrate their skills and abilities to be considered for the G/T program. The process included more identification criteria and a language-free, culturally fair identification instrument adjusted to grade levels. All K-1 students take the Naglieri Nonverbal Ability Test to ensure that no students are overlooked. The staff nomination instruments and criteria differ by grade level. Grades 1-8 use the Stanford/Aprenda and grade 9-12 can also use the PSAT in the identification criteria. The district trains all teachers in the identification process.

Recommendation 21:

Increase the number of bilingual/English as a Second Language students in districtwide Gifted and Talented programs.

The BISD bilingual/ESL program administrator and the G/T program coordinator should jointly review current procedures for identification, nomination and screening of students for the G/T program and assess their adequacy for identifying gifted and talented bilingual/ESL students. They should also review the training the district provides to staff and administrators on this process. Based on results of the review, the BISD Bilingual/ESL, the G/T and the Assessment, Research and Evaluation Departments should develop a plan of action to implement the strategies the district proposed for increasing the number of bilingual/ESL students in G/T. The plan should include monitoring procedures and periodic evaluations.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The administrators of the Bilingual/ESL and G/T Departments review district identification, nomination and screening procedures, criteria and assessment tools for identification of bilingual/ESL students for the G/T program.	March 2003
2.	The administrators of the Bilingual/ESL, G/T Departments and Assessment, Research and Evaluation jointly develop an action plan that includes strategies for increasing the number of Bilingual/ESL students placed in G/T, a training plan and schedule and a monitoring and evaluation timeline.	April 2003
3.	The administrators of the Bilingual/ESL and G/T Departments train administrators, staff and teachers of regular education, Bilingual/ESL and G/T in the new procedures and assessments.	April - May 2003
4.	The administrators of G/T and Bilingual/ESL Departments monitor implementation of strategies including training.	April - May 2003 and Ongoing
5.	The administrator of Assessment, Research and Evaluation evaluates the effectiveness of the strategies and prepares a report to the administrators of the Bilingual/ESL and G/T Departments.	December 2003 - June 2004
6.	The administrators of the Bilingual/ESL and G/T Departments refine the procedures and training based on the monitoring and evaluation results.	January 2004 - July 2004

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 2
EDUCATIONAL SERVICE DELIVERY

I. CAREER AND TECHNOLOGY EDUCATION

The TEC, Section 29.181, states that "Each public school student shall master the basic skills and knowledge necessary for managing the dual roles of family member and wage earner; and gaining entry-level employment in a high-skill, high-wage job or continuing the student's education at the post-secondary level." The Texas Administrative Code, Chapter 74, Subchapter A, requires school districts to offer "Programs of study for broad career concentrations in areas of agricultural science and technology, arts and communication, business education, family and consumer science, health occupations technology, trade and industry and technology education that will prepare students for continued learning and postsecondary education in employment settings."

BISD's Career and Technology Education (CATE) Department is headed by an administrator supported by three lead teachers who give instructional support to the five high schools, one alternative education school and 10 middle schools and by a special education supervisor who works with special education students enrolled in CATE. The CATE program is divided into five clusters, each consisting of one high school and its feeder middle schools. Each high school has a CATE Department chairperson. Each cluster has a CATE Placement Officer (CTPO) whose responsibility is to prepare middle school students to enter high school with a career concentration and manage the guidance/instructional support lab (**Exhibit 2-68**). By assigning CTPOs to clusters, the CATE program strengthens the connection between the high school and its feeder middle schools. The CATE program has 109 teachers, 97 of whom are certified. Twelve CATE teachers are on permit.

Exhibit 2-68
BISD Career and Technology Education Organization
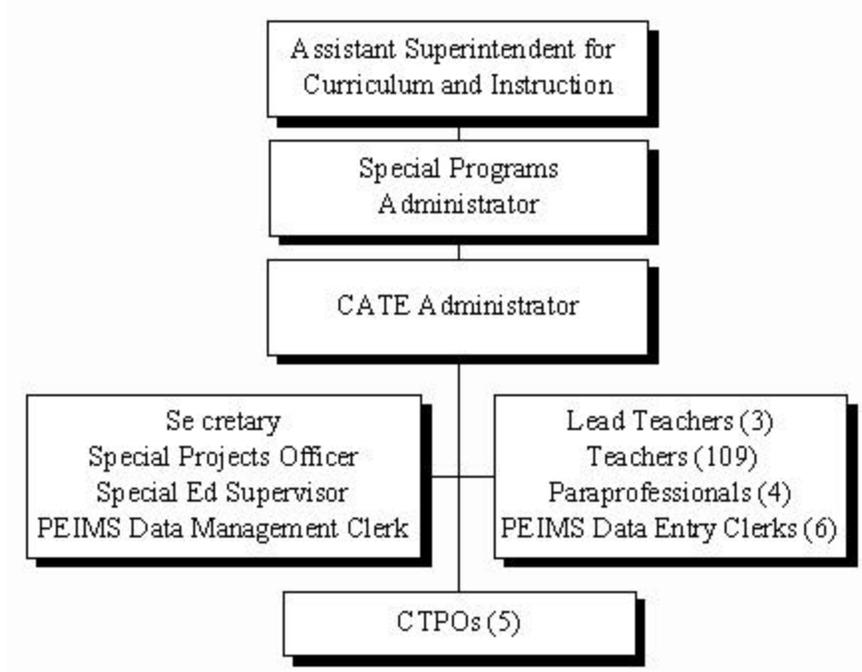
Source: BISD, Career and Technology Education Department, 2002-03.

BISD served 6,908 students in 2001-02 in its CATE programs. The percent of BISD students enrolled in CATE programs was the third lowest among peer districts. BISD's percent of budgeted expenditures for CATE and its per student expenditures for CATE programs were the second highest among the peer districts (**Exhibit 2-69**).

Exhibit 2-69
Percent of Student Enrollment and Budgeted Expenditures in CATE
BISD, Peer Districts, Region 1 and the State
2001-02

District	Number of Students in CATE	Percent Enrolled in CATE	Budgeted CATE Expenditures	Budgeted Career and Technology Expenditures	Per Student Expenditures
Plano	13,677	27.9%	3.2%	$6,369,974	$466
North East	11,425	21.5%	4.4%	$9,208,360	$806
Corpus Christi	8,015	20.4%	4.0%	$5,359,676	$669

Brownsville	**6,908**	**16.2%**	**4.1%**	**$6,241,506**	**$904**
Laredo	3,607	15.6%	4.1%	$3,213,505	$891
Ysleta	5,250	11.2%	3.4%	$5,211,328	$993
Region 1	**60,776**	**19.3%**	**4.4%**	**$47,109,075**	**$775**
State	**802,149**	**19.3%**	**4.1%**	**$599,190,896**	**$747**

Source: TEA, AEIS, 2001-02.

Among peer districts, BISD's CATE program had the third lowest number and percent of students enrolled, the second highest number of teachers and the lowest teacher-student ratio in 2001-02 (**Exhibit 2-70**).

Exhibit 2-70
CATE Student Enrollment and CATE Teachers
BISD, Peer Districts, Region 1 and the State
2001-02

District	Number of Students in CATE	Percent Enrolled in CATE	Number of CATE Teachers (FTEs)	Student - Teacher Ratio
Plano	13,677	27.9%	94.1	145:1
North East	11,425	21.5%	145.9	78:1
Corpus Christi	8,015	20.4%	116.5	69:1
Brownsville	**6,908**	**16.2%**	**125.6**	**55:1**
Ysleta	5,250	11.2%	92.5	57:1
Laredo	3,607	15.6%	60.9	59:1
Region 1	**60,776**	**19.3%**	**933.8**	**65:1**
State	**802,149**	**19.3%**	**11,844.2**	**68:1**

Source: TEA, AEIS, 2001-02.

BISD offers CATE courses in grades 9 through 12. It implements the instructional program through five different CATE magnet programs, one at each high school and through a regular Career Pathways program. All students exiting grade 8 can apply to the magnet programs. Nearly one-fifth of the students in CATE participate in one of the magnet programs.

The CATE Department has articulation agreements with two colleges: Texas Southmost College (TSC) in Brownsville and Texas State Technical

College (TSTC) in Harlingen. An articulation agreement is a formal written contract between a district and a postsecondary institution that coordinates occupational training to eliminate unnecessary duplication of course work. Classes are taught at the high school and are accepted for college credit upon completion of the course and meeting all required technical competencies. The credit hours are transferable to any college or university that accepts such courses. The courses for which credit is accepted at TSC and TSTC under the articulation agreements are indicated in **Exhibit 2-71**.

Exhibit 2-71
BISD CATE Articulation Agreements

College	Courses
Texas Southmost College	Business Engineering Building Trades Law Enforcement Auto Collision Auto Technology Health Services Drafting and Machine Shop Child Development
Texas State Technical College	Agriculture Air Conditioning and Refrigeration Auto Collision Biomedical Equipment Management Building Construction Business Office Technology Chemical Technology Computer Maintenance Computer Science Computer Drafting and Design Culinary Arts Digital Imaging Electronics Electrical Mechanical Manufacturing Environmental Technology Health Information Instrumentation Machining Network Information Management

Source: BISD, Career and Technology Articulation Plans, August 2002.

BISD also participates in the statewide articulation program with the Texas Education Agency and the Texas High Education Coordinating Board. Under the statewide articulation program, participating colleges in Texas accept the articulated high school courses as equal to introductory level college courses.

BISD offers about 200 CATE courses in eight career pathways including Agricultural Science and Technology Education, Business Education, Health Science Technology Education, Family and Consumer Science, Technology Education/Industrial Technology Education, Marketing Education, Trade and Industrial Education and Law Enforcement Training. Using interest and aptitude inventories in grade 8, students select a career major with input from parents and counselors. Based on their selected career major students develop a four-year high school plan that will prepare them for different careers. The eight career pathways and the subjects offered in each are indicated in
Exhibit 2-72.

Exhibit 2-72
BISD CATE Program Offerings by Career Pathways
2002-03

Agricultural Science and Technology Education
Introduction to Agricultural Mechanics Agriculture Science and Technology Career Preparation I Introduction to World Agriculture Science and Technology Agricultural Mechanics I and II Agricultural Metal Fabrication Technology Animal Science Advanced Animal Science Applied Agricultural Science and Technology Agriculture/Home Maintenance and Improvement Agriculture/Structures Technology Vocational Agriculture Independent Study
Business Education
Career Connections Record Keeping Business Communications Accounting I and II WBL/Accounting II WBL/Administrative Procedures WBL/Business Computer Information Systems II WBL/Business Computer Programming Banking and Financial Systems

Business Computer Information Systems I and II
Business Computer programming
Business Support Systems
Business Management I
Business Law I
WBL/International Business
Introduction to Business
Keyboarding
Word Processing Applications
Telecommunications and Networking
Business Image Management and Multimedia
Basic Computer Technology (A+)
Networking Essentials (N Plus)
Internetworking Technology I and II
Business Ownership
Administrative Procedures I and II
Business Education Career Preparation I and II
Business Education, Independent Study

Marketing Education

Marketing Yourself
Marketing Dynamics, Coop Education I
Retail Merchandising
Principals of Marketing Education
Technology in Marketing
Entrepreneurship
WBL/Fashion Marketing
WBL/Service Marketing
WBL/Food Marketing
WBL/Hotel Management
WBL/General Merchandising
WBL/Restaurant Marketing
WBL/Marketing, Other
WBL/Traveling and Tourism Marketing
Marketing Education, Independent Study

Health Science Technology Education

Introduction to Health Science Technology I
Health Science Technology I, II and III
Anatomy and Physiology for Human Systems
Medical Microbiology
Pathophysiology
Medical Terminology
Gerontology
Clinical Nutrition
Pharmacology

Mental Health
Health Science Technology Career Preparation I
WBL/Therapeutic Careers
WBL/Diagnostic Careers
WBL/Information Careers
WBL/Environmental Careers
Health Science Technology independent Study

Consumer and Family Science

Individual and Family Life
Family Health Needs
Preparation for Parenting
Theories of Child and Adolescent Development
Child Development
Principals of Child and Adolescent Development
Parent Education for School Age Parents I and II
Child Care, Guidance, Management and Services
Personal and Family Development
Introduction to Education
Elementary School Teacher Assistance
Ready, Set, Teach I and II
Career Studies
Family and Career Management
Apparel
Textile and Apparel Design
Housing
Interior Design
Food Production, Management and Services I and II
Nutrition and Food Science
Food Science and Technology
Hospitality Services I and II
Institutional Management I and II
Management
Consumer and family Economics
Home Economics Education, Independent Study
Family and Consumer Science Career Preparation I and II
WBL/Home Economics PM
WBL/Service to Older Adults
WBL/Child Care and Guidance
WBL/Food-Prod, Management Services
WBL/Hospitality Services
WBL/Institutional Management
WBL/Housing, Furniture, Equipment OMS

Trade and Industrial Education

Trade and industrial Career Preparation I and II

Diversified Career Preparation I
Introduction to Auto Body I
Automotive Collision Repair and Refinishing Technology I and II
Auto Collision III Job Shadowing
Introduction to Auto Mechanics/Technology
Automotive Technician I and II
Automotive technician III Job Shadowing
Introduction to Cabinet Making
Cabinet Making I and II
Introduction to Construction Careers
Building Trades I and II
Building Trades III Job Shadowing
Air Conditioning I and II
Cosmetology I and II
Introduction to Graphic Communications Careers
Drafting I and II
Drafting III Job Shadowing/Apprentice
Introduction to Electrical/Electronics Careers
Industrial Electronics I and II
Introduction to Computer Maintenance
Computer maintenance Technician I and II
Industrial Electronics III Job Shadowing
Introduction to Machine Shop
Machine Shop I and II
Machine Shop III Job Shadowing/Apprentice
Introduction to Media Technology
Media Technology I and II
Computer Multimedia and Animation Technology
WBL/Construction Maintenance Systems
WBL/Communication and Media Systems
WBL/Transportation Systems
WBL/Electrical/Electronics Systems
WBL/Personal/ Protective Services Systems
Trade and Industrial Education Independent Study I

Law Enforcement Training

Introduction to Criminal Justice
Court and Criminal Procedures
Criminal Investigation
Job Shadowing
Career Preparation - Personal and Protective Services Systems
Crime in America
Fundamentals of Criminal Law

Technology Education/Industrial Technology Education

Technology Systems (General Shop)

Technology Systems (Modular Lab)
Communication Systems I
Manufacturing Systems I
Construction Systems I
Computer Applications
Architectural Graphics I
Engineering Graphics I
Electricity/Electronics I
Communication Graphics
Research Design and Development, Independent Study I
Problems and Solutions in Technology

Technology Systems (General Shop)
Technology Systems (Modular Lab)
Communication Systems I
Manufacturing Systems I
Construction Systems I
Computer Applications
Architectural Graphics I
Engineering Graphics I
Electricity/Electronics I
Communication Graphics
Research Design and Development, Independent Study I
Problems and Solutions in Technology

Source: BISD, Career and Technology Department Course Listing Guide, 2002-03.

The academic performance of BISD CATE students improved on every TAAS subject from 1996-97. The percent of students passing the reading test improved from 76.6 in 1996-97 percent to 86.7 percent in 2000-01, the percent passing the math test improved from 67.8 percent to 88.6 percent and the percent passing the writing test improved from 77.8 percent to 84.4 percent. Students also demonstrated an increase in attendance rate and a decrease in dropout rate over the same period (**Exhibit 2-73**).

Exhibit 2-73
CATE Students' TAAS Performance, Attendance and Dropout Rates
1996-97 through 2000-01

Year	Percent Passing All Tests	Percent Passing Reading	Percent Passing Math	Percent Passing Writing	Attendance Rate	Dropout Rate
2000-01	76.7%	86.7%	88.6%	84.4%	*	0.8%
1999-2000	77.3%	86.3%	88.8%	86.7%	95.1%	0.9%

1998-99	75.2%	84.8%	85.2%	88.2%	94.7%	0.9%
1997-98	65.1%	76.2%	77.0%	80.9%	93.1%	1.2%
1996-97	57.5%	76.6%	67.8%	77.8%	93.7%	3.2%

*Source: TEA, District Career and Technology Education Civil Rights Compliance
Review, January 22-24, 2001 and District Effectiveness and Compliance (DEC) Report,
October-November 2001.*
* Data not available.

BISD students participate in CATE-related student organizations such as
Business Professionals of America (BPA), Distributive Education Clubs
of America (DECA), Family, Career and community Leaders of America
(FCCLA), Future Farmers of America (FFA), Health Occupations Student
Association (HOSA), Vocational Industrial Clubs of America (VICA) and
Technology Students Association (TSA). CATE students have won VICA
competitions as best drafts person seven years in a row. Seven of BISD's
top high school academic students in 2001-02 were CATE students.

Since 1996, the BISD CATE program has offered two six-week evening
classes to adults at all district high schools. CATE teachers teach the
classes twice a week at no cost to the participants. Classes are available in
computer applications and keyboarding, computer maintenance, machine
shop, AutoCAD, introduction to web page design and basic architectural
design. Between 300 and 400 adults take classes. Local businesses send
their employees to these classes and reciprocate by opening their
businesses to internships and job-shadowing projects.

The fall 2001 DEC review included a review of the CATE program. The
DEC review included 12 program indicators and the district's program was
found in compliance with all state requirements. The CATE program
conducts annual evaluations reviewing areas such as quality and
availability of instructional offerings, functions of the advisory committee,
student enrollment, facilities and equipment, professionalism, program
goals and objectives, youth organizations, cooperative programs, teacher
performance, student performance and program completion rates.The
BISD Assessment, Research & Evaluation Department evaluated the
Career Pathway program in 2001 and the CATE program in 2002.

FINDING

BISD has a comprehensive, well-planned CATE program that offers a
wide range of opportunities to students. Following a feasibility study that

reviewed business and community needs and a strategic planning effort beginning in 1987-88, the district established five magnet programs. The impetus for the magnet programs was the ongoing relocation of manufacturing industries to the Rio Grande Valley and the resulting need for a highly trained workforce.

BISD established a Strategic Planning Taskforce in 1990-91 that included representatives from the Brownsville Chamber of Commerce, civic organizations, local colleges and the local Rotary Club. The task force formed action committees to study the needs of the community and develop plans to meet those needs. Members of the Vocational Advisory Committee joined the action committees. The task force also conducted a community survey. These efforts resulted in the recommendation to restructure the BISD CATE program that had been focused primarily on agriculture and made up largely of a collection of elective courses. The recommendation was to establish specialized CATE magnet programs that could better meet community and business needs. The programs, their locations and the year each was established are as follows:

- Magnet Program for Engineering at the Gladys Porter High School in 1992-93;
- Magnet Program for Medical and Health Professions at the Homer Hanna High School in 1993-94;
- Magnet Program for Fine Arts Professions at the Lopez High School in 1994-95;
- Magnet Program for Law and Criminal Justice at the James Pace High School in 1997-98; and
- Magnet Program for International Business Professions at the Rivera High School in 1999-2000.

The magnet programs are established as schools within schools and offer intensive academic and technology instruction to students in grades 9-12. To gain admission to the magnet programs, students must complete an application signed by the parents, pass all TAAS exams in grade 8, have a grade of 70 or better in all grade 8 courses, maintain a 70 percent average in each class at the end of each grading period and get teacher recommendations. The district offers transportation to any of the magnet programs. In 2001-02, 1,308 students participated in the CATE magnet programs. The high school, magnet program and participants by grade are indicated in **Exhibit 2-74**.

Exhibit 2-74
CATE Magnet
2001-02

High	Magnet Program	Grade	Grade	Grade	Grade	Total

School		9	10	11	12	
Hanna	Health Services	136	118	104	80	438
Porter	Engineering	101	98	91	76	366
Pace	Law Enforcement	134	142	61	29	366
Rivera	International Business	53	31	54	0	138
Lopez	Fine Arts	*	*	*	*	*
Total		424	389	310	185	1,308

Source: BISD, Career and Technology Department, September 2002.
* Numbers for the Fine Arts magnet school are not available.

CATE has established additional programs and expanded opportunities for its students. In 1995-96, the BISD CATE program developed a partnership with General Motors (GM) in the area of Fixed Operations. Under this program, 15 BISD students in grade 11, selected by the district, complete a year-long non-paid internship in four areas of certification: computerized cataloging, service writing, insurance and warrantee and auto collision estimating. Upon completion, the students become free agents and can apply for employment in these four areas. TEA selected the BISD CATE partnership program with GM as a model CATE program. The program also has won an award in the area of school/community partnership from the Texas State Teachers Association.

CATE has applied and secured Workforce Investment Act (WIA) funds in 2000-02 for a summer jobs program for CATE high school students. In 2002-03, BISD started an embroidery business that integrates Business Ownership and Business Management courses in the Business Education Department at Rivera High School. The embroidery business project uses SCE funds, state vocational funds and special education funds. BISD also uses these same three funding sources for an Information Technology program at Lopez High School that began in 2002-03. During 2002-03, the BISD CATE program also uses WIA funds to offer paid internships in private businesses to economically disadvantaged students who have completed at least 2.5 credits in a Career Pathway program.

BISD's CATE Department has work-based cooperative education agreements with more than 50 local businesses in the areas of office education, marketing, health care and family and consumer science. Students can earn credits toward industry-recognized credentials in several programs. The health science technology curriculum incorporates a one-year job shadowing rotation program at the Valley Regional Hospital and

the Brownsville Medical Center, allowing students to gain practical experience in health sciences. Through non-paying internships with local businesses in law and criminal justice, engineering, building trades, health services, child-care and hospitality services students develop knowledge about careers and career options.

BISD works closely with the Brownsville Economic Council and the Brownsville Chamber of Commerce. The Chamber of Commerce established an Education Committee that has played a key role since 1991-92 in establishing the district's magnet programs. In 2002-03 BISD has two business advisory committees, located at two high schools: the Information Technology Committee at Lopez High School and the Business Ownership and Management Committee located at Rivera High School. The committees get input from teachers and conduct feasibility studies on implementation of specific programs. Typically, committees have 12 members including the principal, business representatives, students, teachers and university representatives. Following a recommendation of its Advisory Committee, BISD is upgrading its automotive technician program, which is part of its Career Pathways program, to meet national standards. The committee is currently surveying the business community to identify employment opportunities. Based on the community survey, CATE may develop the automotive technology program into an academy.

To encourage CATE-related student activities, BISD provides supplementary pay of $2,400 a year to CATE teachers who become involved with TEA-approved youth leadership organizations, attend TEA-sponsored staff development and do community service projects with their students.

BISD's CATE students participate in national competitions and have received many awards. In a 2001 Technology Student Association competition in Denver, Colorado, the BISD TSA team received six top ten awards. A BISD student who won a state technical drafting championship also won second place in the national SkillsUSA Competition in 2001. The BISD team that competed in the Business Professional of America received 55 awards.

COMMENDATION

BISD combines a variety of course offerings and teacher incentives to enhance overall student participation and achievement in the CATE program.

FINDING

Although BISD offers a comprehensive CATE program, LEP students are significantly underrepresented in total course enrollments, 15.5 percent, as compared to an overall 44.2 percent representation in student enrollment (**Exhibit 2-75**). The district's Assessment, Research and Evaluation Department identified this as an issue in a 2002 internal evaluation of the CATE program.

Exhibit 2-75
CATE Student Demographics
2001-02

Student Sub-populations	Number of CATE Students	Percent of CATE Students*	Percent of Students in BISD**
Male	3,421	50.7%	51.0%
Female	3,321	49.2%	49.0%
Gifted and Talented	717	10.6%	5.4%
Special Education	657	9.7%	11.8%
Migrant	513	7.6%	8.6%
LEP	1,049	15.5%	44.2%
At-Risk	4,245	62.9%	66.4%

Source: BISD, Assessment, Research and Evaluation Department, Pentamation Database, 2001-02.
* Total number of CATE students = 6,742.
** Total number of BISD students = 42,693.

BISD administrators attributed low participation rates for LEP students in CATE courses to a lack of information and a limited opportunity to take electives due to increased class schedules including remedial courses. The district did not provide information on CATE programs to recent immigrant students and especially to female students. Recent immigrant students spend most of their time in language mastery classes during the first year and their schedule does not allow time for participation in CATE or other electives. ESL counselors, for example, place recent immigrant students in soccer to satisfy their physical education requirement or in music to satisfy their Fine Arts requirement and to acquaint them with the school culture.

According to district staff, counselors indicated that LEP students do not have a sufficient level of English proficiency to succeed in CATE classes

through the Career Pathways or magnet programs. Although BISD provides LPACs with course listing guides to promote and recommend all courses, including those in the CATE program, the Bilingual/ESL Department has not trained the LPACs on the benefits that LEP students can gain from CATE courses.

Some districts serving students with limited English proficiency assimilate students into both core coursework and CATE classes through cooperation from guidance counselors and members of an LPAC committee. These districts frequently include LPAC members in provided training and staff development regarding districtwide program and course offerings in areas such as CATE. Additionally, many of these districts identify potential barriers for LEP student participation in CATE and other special programs at both the middle and high school levels through cooperative efforts between teachers, counselors, parents, LPAC committee members and students themselves.

Donna ISD's director of CATE programs facilitates cooperative efforts between the CATE program, guidance counselors, regular educators and administrative staff to increase participation of all students. The director additionally encourages LEP student participation in CATE courses by pairing LEP students with peers or bilingual staff to help with additional language translations needed during classes.

Recommendation 22:

Increase participation of limited English proficient students in career and technology education courses.

The district's CATE personnel should collaborate with the Bilingual/ESL Department staff and with high school counselors to increase CATE program awareness among LEP students and their parents of the benefits of participation in the CATE program through Career Pathways or through the magnet programs. The district should the district should increase communication efforts and professional development offerings for teachers, counselors and Language Proficient Assessment Committee (LPAC) members and students themselves.

The CATE Department should also work with the middle and high school counselors to identify and address barriers to CATE course selection and scheduling. The CATE Department jointly with the Bilingual/ESL Department and its district ESL counselor should designate a position for an ESL vocational liaison. The CATE Department jointly with the Bilingual/ESL Department should train members of LPACs in CATE program benefits and demonstrate how to integrate CATE courses into the academic schedules for LEP students.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The CATE administrator and the Bilingual/ESL administrator meet with middle and high school counselors to discuss barriers to LEP student participation in CATE.	March 2003
2.	The CATE administrator and the Bilingual/ESL administrator train members of LPACs in benefits of CATE and demonstrate how to schedule LEP students in CATE courses.	March 2003
3.	The CATE administrator and the Bilingual/ESL administrator develop a plan to increase LEP student participation in CATE and submit it to the superintendent through the assistant superintendent of Curriculum and Instruction for review and approval.	April 2003
4.	The CATE administrator and the Bilingual/ESL administrator work with middle and high school counselors to implement a program to increase awareness of LEP students and their parents about CATE and its benefits.	April - May 2003
5.	The CATE administrator and the Bilingual/ESL administrator designate a CATE staff member to work as the ESL vocational liaison.	May 2003
6.	The CATE administrator monitors LEP participation in CATE and submits reports to the superintendent through the appropriate supervisory staff.	September 2003 and Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The district underestimates student enrollment projections for CATE courses and subsequently has an insufficient number of CATE teachers at the beginning of the school year. BISD does not project enrollment in specific programs by teacher and course but rather uses staff projections based on projections of overall student enrollment. More students were enrolled in CATE courses in 2002-03 than the school administrators expected, creating a CATE teacher shortage. BISD does not recognize the need to hire more teachers and begin recruitment until the schools complete their master schedule projections. Although the district has a timeline for completion of master schedule projections, the schools did not meet the timeline and delayed the hiring process.

Principals were not able to submit proof of projected enrollment growth to justify the hiring of additional teachers by the time specified in the district timeline. As a result, the district understaffed the CATE program by six teachers on the first day of classes in 2002-03. Of the six CATE teachers to be hired, three were hired by the end of the first week of classes, two were hired within the first three weeks of school and the sixth was recommended for employment more than a month after the start of school.

BISD did not cancel any of the CATE classes because of unavailability of teachers. Some of the classes were rescheduled for the spring semester. Some students were placed in existing classes on a temporary basis until new teachers were available.

Many districts such as San Angelo ISD use end of the year student surveys and staff projections to more accurately predict CATE course enrollments for the following year. These districts frequently include total student enrollment projections and historical CATE participation rate trends in a comprehensive projection for future course and teacher scheduled projections.

Recommendation 23:

Modify student enrollment projections and staff allocation model and ensure timely hiring of career and technology education staff.

The BISD superintendent and assistant superintendent for Curriculum and Instruction should review the student enrollment and staff allocation models the district uses and assess their accuracy overall and by program. BISD should refine these models to increase accuracy of projections for enrollment and staffing in specific programs. BISD should also review the timeline for the completion of master schedules, identify barriers to timely completion and implement strategies for corrections. BISD superintendent should hold principals accountable for completing master schedule projections on time. In addition, BISD should review its timeline for hiring new teachers and adjust it to ensure that all new teachers are hired before the start of the school year.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent establishes a committee to review the district's projection models for student enrollment and staff allocation and the information used in the model to determine accuracy overall and by program.	March 2003
2.	The committee collects data, determines accuracy and prepares a report with recommendations for the superintendent and board.	March - April 2003

3.	The superintendent reviews the report with assistant superintendents, school administrators and program directors.	April 2003
4.	The superintendent implements the recommendations including a timeline for master schedule completion and hiring.	May 2003
5.	The superintendent monitors implementation and evaluates accuracy of refined projection models overall and by program and timeliness of hiring of new teachers.	June - October 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 2
EDUCATIONAL SERVICE DELIVERY

J. DROPOUT PREVENTION/ALTERNATIVE EDUCATION

Texas has established dropout prevention as one of its primary goals. TEA considers the dropout rate as one of four criteria in assigning annual accountability ratings to districts and schools, along with performance on the TAAS, attendance and data quality. TEA requires districts to report information on students who leave school, which is used to determine a district's dropout rate. Districts must use the guidelines in the TEA Leaver Codes and Definitions to report information on students who withdraw from school. School districts must also develop a comprehensive dropout prevention plan that addresses how schools will work to prevent students from dropping out of school.

BISD reduced its dropout rate from 1.6 percent in 1997-98 to 1.0 percent in 2000-01. BISD's 2000-01 dropout rate was the third lowest among peer districts, lower than the rate in Region 1 and the same as the state average (**Exhibit 2-76**). BISD administrators credit the decrease in the district's dropout rates to its identification and prevention programs. BISD has made efforts to identify at-risk students early in their educational process and uses programs such as Parental Involvement, 9th Grade Initiative, STARS and Communities In Schools to address the needs of these students. BISD also uses PEIMS information to identify, track and bring back students who dropped out of school and who did not show up at the start of the school year. Parent liaisons and school administrators make home visits and request information from neighbors and friends to track such students.

Exhibit 2-76
Annual Dropout Rates
BISD and Peer Districts
1997-98 through 2000-01

District	1997-98	1998-99	1999-2000	2000-01
Laredo	3.2%	1.1%	1.0%	1.2%
Corpus Christi	2.6%	1.7%	1.3%	1.0%
Ysleta	1.6%	2.9%	2.1%	1.4%
Brownsville	**1.6%**	**1.3%**	**1.0%**	**1.0%**
North East	1.1%	1.1%	0.8%	0.6%

Plano	0.6%	0.2%	0.2%	0.3%
Region 1	**1.8%**	**1.7%**	**1.7%**	**1.2%**
State	**1.6%**	**1.6%**	**1.3%**	**1.0%**

Source: TEA, AEIS, 1997-98 through 2000-01.

BISD's dropout prevention programs are the Teen Learning Community (TLC), the Alternative Education Center (AEC) and Lincoln Park. BISD established the Teen Learning Community, a disciplinary alternative education program (DAEP) for students in grades 6-12, in 1998. The Teen Learning Community houses students expelled from their home schools for discretionary offenses described in Section 37.007 (b), (c) and (f) of the TEC and for students who are not eligible to be enrolled in the Cameron County Juvenile Justice Alternative Education Program (CCJJAEP). Typically students are expelled for one semester. The Teen Learning Community provides educational instruction in reading, math, writing, science and social studies and in self-discipline. The Teen Learning Community's budget for 2002-03 is $1.5 million and its 42 full-time equivalent staff includes a principal, one assistant principal and 11 teachers all certified in the areas in which they teach. In addition, three of the teachers have alternative education certifications. The Teen Learning Community staff includes five paraprofessionals, eleven drill instructors, 2.5 counselors one of whom is a Communities In Schools case manager, a nurse, three custodians and two clerks. The Teen Learning Community program has three components: cognitive, affective and psychomotor.

The Teen Learning Community uses the American Preparatory Institute's curriculum and NovaNet. The American Preparatory Institute, accredited by the Texas Education Agency, offers a high school diploma program. The API curriculum is individualized, competency-based and delivered through a student-directed instructional system that is based on the principals of mastery learning. Students must demonstrate 70 percent mastery of course content to receive credit. NovaNet is a competency-based computer program aligned to TEKS and TAAS. The Teen Learning Community curriculum for middle school students follows the BISD curriculum scope and sequence and is augmented with American Preparatory Institute modules. Similarly, the Teen Learning Community uses the BISD curriculum frameworks for ESOL I and II and Newcomers I and II for ESL students.

The Teen Learning Community requires that parents drop their children at the Teen Learning Community at 6:30 a.m. and students remain in school until 5:00 p.m. Before a student is released from the program, staff from Teen Learning Community and the home school hold a transition meeting to discuss the student's progress. The Teen Learning Community staff also

conduct after care visits twice a year to the home school of each released student to check on attendance, academic performance and discipline referrals.

Student TAAS data are routed back to the students' home school, and staff are not responsible for evaluating student TAAS performance. Staff at the Teen Learning Community do, however, set goals and evaluate student services based on the following objective:

"By the end of the expulsion period the student shall earn at least two course credits in the core subjects; complete 60 percent of course work attempted; have two or fewer discipline referrals; have at least a 95 percent attendance rate, participate in at least six hours of individual, family and group counseling; and participate in all required sessions of Texas Assessment of Knowledge and Skills remediation and preparation."

In 2001-02, the Teen Learning Community enrolled 286 students: 138, or 48.2 percent, were high school students and 148, or 41.8 percent, were middle school students. On average, high school students stayed at the Teen Learning Community for 84 days and middle school students stayed for 78 days. In 2001-02, 51 percent of the middle school students and 10 percent of the high school students were placed in the Teen Learning Community after placement in the district's Alternative Education Center. In 2001-02,

- 77 percent of all middle school students completed 60 percent of courses attempted in reading, language arts, math, science or history;
- 94 percent of all high school students earned at least two course credits in reading, language arts, math, science or history;
- 72 percent of students received or fewer disciplinary referrals; 30 percent received 5 or more referrals;
- Teen Learning Community students had a 91 percent attendance rate; and
- Students had a 5 percent recidivism rate.

The Alternative Education Center, housed on the Webb campus, is a discipline alternative education program that serves students in grade 6-12 who have been removed from their home schools for minor infractions such as persistent misbehavior, disrespect, rudeness or fighting. Placement can be either short term, less then 30 days, or long term. The Alternative Education Center program has a maximum capacity of 202. In 2001-02, 864 students attended. The Alternative Education Center had a budget of $1.2 million in 2001-02 and a staff of 40 consisting of 13 teachers, all fully certified, with two being certified in special education and one in alternative education. Each teacher has a self-contained classroom and is

assisted by an instructional aide. In addition to the principal, the staff includes 13 instructional assistants, two counselors, a nurse, a home visitor, two security officers, a receptionist, a secretary, three custodians and two cafeteria workers.

The Alternative Education Center ensures an uninterrupted educational program for its students. Students receive their assignments from their home-school teachers, who also check the assignments. Students who are placed at the Alternative Education Center for a long term can earn credit by following the API curriculum. All students receive counseling and work with assigned caseworkers from a dropout prevention program, Communities in Schools.

Lincoln Park School's Teen Parenting Accelerated Program (TPAP) was established in 1990-91 as part of the district's dropout prevention program. TPAP is an alternative education school of choice. The school provides pregnant or parenting teens in grades 6-12 with the opportunity to continue their education and acquire a high school diploma at an accelerated rate. In addition to promoting educational goals, TPAP offers education in family planning and subsequent pregnancies, career counseling, job shadowing, job readiness training, work-based learning and career pathways. TPAP also provides on-site day care for infants up to the age of 17 months. The TPAP day care center is able to accommodate 56 infants. Due to limitations in staffing, the center provided care for 35 infants in 2001-02.

TPAP classes are small, with efforts made to limit class size to 12 to 15 students. TPAP provides a self-paced, individualized curriculum through API and NovaNet. TPAP also offers after-school and Saturday tutorials. TPAP offers TAAS enrichment classes including a Power TAAS seminar the week before TAAS. The 2-day seminar devotes one day to reading and one day to writing. TPAP students' performance on TAAS is shown in **Exhibit 2-77**.

Exhibit 2-77
Lincoln Park TPAP Student Performance on
TAAS, Attendance and Dropout Rates
2001-02

Performance Area	Local Accountability Standard	TPAP Students Performance
Reading	50%	91.0%
Math	50%	73.0%

Writing	50%	90.0%
Science	50%	100.0%
Social Studies	50%	100.0%
Attendance	95%	87.4%
Dropout	3.5%	5.1%

Source: BISD, Lincoln Park School, Campus Action Student Achievement Improvement Plan, 2002-03.

TPAP has a strong CATE component. All students get a career inventory upon entry into the program. Through a WIA grant, TPAP offers work-based learning where students attend school for half a day and work half a day, earning $7 an hour. In 2001-02, 12 students participated in the work-based learning program. TPAP also contracted with the Brownsville Good Samaritan program to provide a nine-week Nursing Assistant Certificate program. In 2002-03, TPAP started a cooperative program in Business and Consumer Trades area from which eight students have been placed.

In 2001-02, TPAP served 191 students, 106 of whom were long-term assignments of more than 85 days. Typically, students stay in the program for one and a half to two years.

TPAP has a staff of 38.5 FTE consisting of 13.5 teachers, eight aides, a counselor, a nurse, a social worker, a parent liaison, four office staff, five custodians and four cafeteria workers, in addition to the principal and assistant principal. The Lincoln Park TPAP budget in 2001-02 was $195,642; the budget decreased in 2002-03 to $172,707. Lincoln Park TPAP students graduate from their home schools.

FINDING

BISD's Alternative Education Center and the Teen Learning Community programs have a higher percent of special education students than their percent in the district (**Exhibit 2-78**). In 2001-02, 22 to 40 percent of the students placed in the Alternative Education Center were special education students compared with the district's special education rate of 13.3 percent.

Exhibit 2-78
Alternative Education Center
Student Placements by Sub-population
2001-02

Student Population	1st Six Weeks	2nd Six Weeks	3rd Six Weeks	4th Six Weeks	5th Six Weeks	6th Six Weeks
Special Education	36%	40%	30%	35%	24%	22%
At-Risk	100%	100%	100%	100%	100%	100%
Economically Disadvantaged	90%	90%	90%	90%	90%	90%

Source: BISD, AEC Campus Action Student Achievement Improvement Plan, 2002-03.

Out of 867 students placed at the Alternative Education Center in 2001-02, 184 or 21.2 percent, were special education students (**Exhibit 2-79**).

Exhibit 2-79
Alternative Education Center
Student Placements by Sub-population
2001-02

Student Population	Number of Students in District	Percent of Identified Students in District	Number of Students Placed in AEC	Percent of Identified Students Placed in AEC
G/T	2,297	5.4%	8	0.9%
ESL	5,187	12.2%	83	9.6%
Special Education	4,935	11.6%	184	21.2%
Total	**42,541**	**29.2%**	**867**	**31.7%***

Source: BISD, AEC, 2002-03.
*Note: Total only includes identified students.

The percent of special education students placed in the Teen Learning Community program in 2001-02 was twice as large as their percent in the total BISD population (**Exhibit 2-80**). The BISD Special Education administrator attributes the high percent of special education students in the BISD DAEPs to the ineffectiveness of in-school suspension (ISS) programs at the elementary level in developing social skills and behavioral compliance and to the lack of staff skills and experience in how to deal effectively with these students. BISD is developing Behavior Intervention Plans (BIP) but has not trained its staff on how to analyze behavior, figure

out the cause of the disruptive behavior and develop interventions that work.

Exhibit 2-80
Teen Learning Community
Student Placements by Population
2001-02

Student Population	Number of Students in District	Percent of Identified Students in District	Number of Students Placed in TLC	Percent of Students Placed in TLC
G/T	2,297	5.4%	**	0.3%
LEP	18,633	43.8%	76	26.6%
Special Education	4,935	11.6%	70	24.4%
Total	**42,541**	**60.8%**	**286**	**51.3%***

Source: BISD, TLC, 2002-03.
*Total denotes placement of students in G/T, LEP and Special Education students only.
**Denotes a number less than 5.

To manage special education students with disruptive behavior, Special Education Departments through their admission, review and dismissal committees conduct functional behavior assessments (FBA) and develop behavior intervention plans for these students.

Recommendation 24:

Develop and implement strategies to reduce the number of special education students placed in disciplinary alternative education programs.

BISD Special Education Department should review its procedures and strategies for handling students with disruptive behaviors and determine whether these strategies were implemented with special education students placed in the district's disciplinary alternative education programs prior to such placements. The Special Education Department should also review the training it provides to both special education teachers and to regular education teachers who have special education students in their classes. Following such a review, BISD should train all teachers in these strategies, establish a process for handling disruptive special education

students and monitor the implementation of these strategies at the home schools.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Special Education administrator reviews with school administrators the procedures and strategies that special education and regular education teachers use to manage the behavior of special education students.	March 2003
2.	The Special Education administrator and school administrators modify the behavior management strategies schools use for managing special education students.	April 2003
3.	The Special Education administrator trains school administrators and staff in behavior management strategies and procedures for special education students.	April 2003
4.	The Special Education administrator monitors the implementation of the behavior management strategies and procedures at each school.	May - June 2003
5.	The Special Education administrator reviews statistics on the number of special education students placed in the district's disciplinary alternative education programs.	December 2003 - May 2004

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 3
HUMAN RESOURCES MANAGEMENT

This chapter reviews the Brownsville Independent School District's (BISD) human resources management in the following sections:

A. Organization and Management
B. Staffing Patterns, Salaries and Benefits
C. Recruitment and Hiring Activities
D. Staff Development and Employee Management

A school district's human resources and personnel costs are typically its two largest expenditures, accounting for 80 percent of its total expenses. As a result, effective management of human resource functions is critical to the district's overall success.

BACKGROUND

School districts vary in how they organize these functions. Some districts have Staff Development and Benefits Departments within Human Resources, while others task them out to departments outside of Human Resources.

The human resource function is generally responsible for:

- recruiting employees;
- overseeing the interviewing, selection and processing of new employees;
- retaining employees;
- processing promotions, transfers and resignations;
- determining and maintaining compensation schedules;
- planning and forecasting personnel needs;
- maintaining complete employee records;
- developing and maintaining job descriptions;
- managing the employee evaluation process;
- handling employee complaints and grievances;
- developing personnel policies; and
- ensuring that related laws and regulations are followed.

Chapter 3
HUMAN RESOURCES MANAGEMENT

A. ORGANIZATION AND MANAGEMENT

BISD's Human Resources Department is led by an area superintendent of Human Resources. It is broken up into two departments, Classified Personnel and Certified Personnel, with its own administrator. These departments are active in recruitment and hiring activities, processing employment status changes, maintaining complete employee records, including certification information for professional staff, job descriptions, the employee evaluation process, and handling employee complaints and grievances. Benefits enrollment and insurance administration are coordinated through the Finance Department. Payroll is also handled by the Finance Department, while professional development is handled by the Curriculum and Instruction Department.

Exhibit 3-1 displays the Human Resources Department's organization chart.

Exhibit 3-1
BISD Human Resources Department
Organization Chart 2002-03
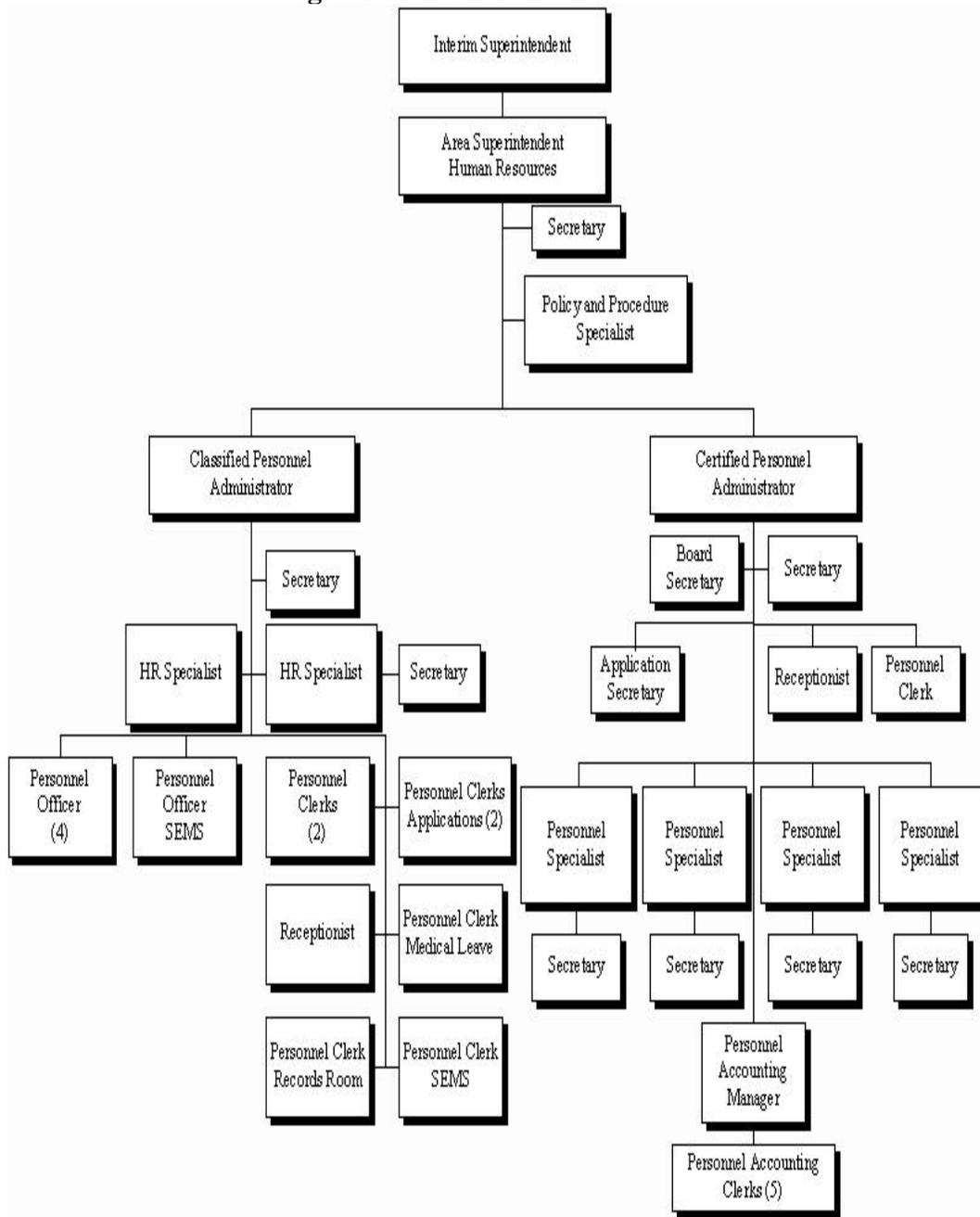
Source: BISD Human Resources Organizational Charts, 2002-03.

**Exhibit 3-2** displays the Insurance and Safety Department's organization chart.

Exhibit 3-2
BISD Organization Chart
Insurance and Safety Department
2002-03

```
                    ┌─────────────────────────┐
                    │  Interim Superintendent │
                    └─────────────────────────┘
                                 │
                    ┌─────────────────────────┐
                    │        Interim          │
                    │ Chief Financial Officer │
                    └─────────────────────────┘
                                 │
                    ┌─────────────────────────┐
                    │    Employee Benefit     │
                    │      Administrator      │
                    └─────────────────────────┘
                                 │
                                 ├──────────────┤ Secretary │
                                 │
                                 ├──────────────┤ Receptionist │
                                 │
              ┌──────────────────┴──────────────────┐
       ┌──────────────┐                      ┌──────────────┐
       │    Safety    │                      │   Employee   │
       │  Coordinator │                      │   Benefits   │
       └──────────────┘                      │  Specialist  │
              │                              └──────────────┘
  ┌───────────────────────┐                         │
  │       Workers'        │              ┌─────────────────────┐
  │  Compensation Clerk   │              │      Employee       │
  └───────────────────────┘              │   Benefits Nurse    │
  ┌───────────────────────┐              └─────────────────────┘
  │     Safety Clerk      │              ┌─────────────────────┐
  └───────────────────────┘              │     Clerks (4)      │
  ┌───────────────────────┐              └─────────────────────┘
  │        Clerk          │
  └───────────────────────┘
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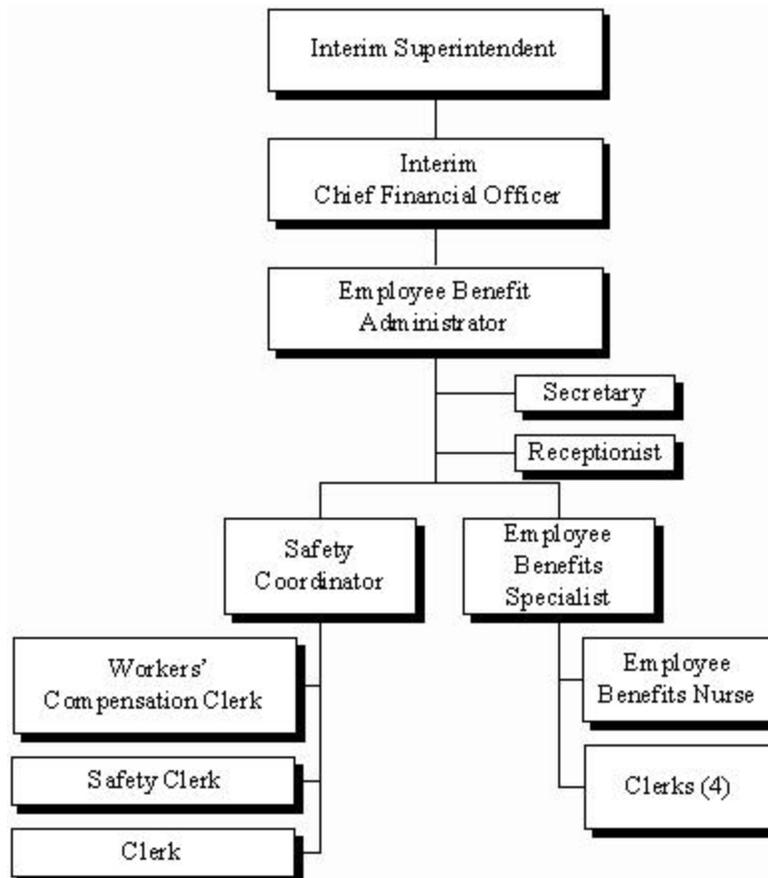
Source: BISD Insurance and Safety Department Organizational Chart, 2002-03.

Exhibit 3-3 displays the Professional Development Department's organization chart.

Exhibit 3-3
BISD Organization Chart
Professional Development Department
2002-03
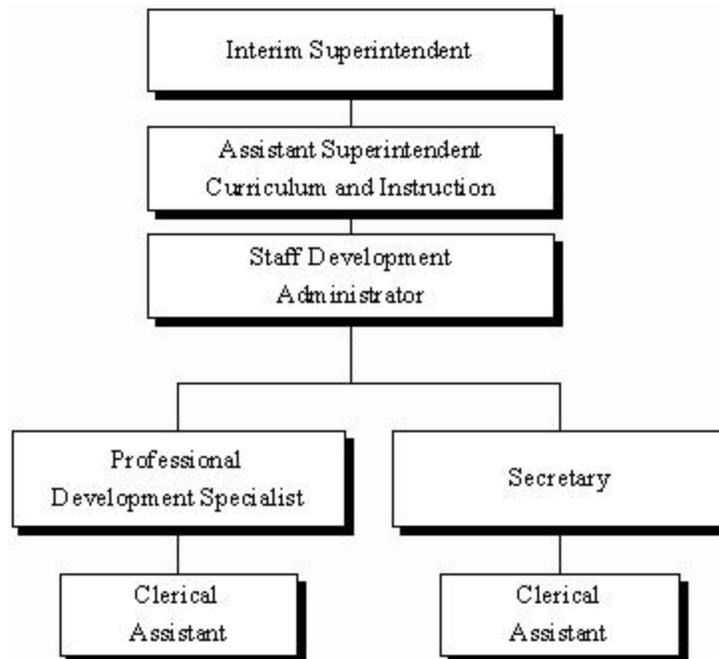
Source: BISD Professional Development Organizational Chart, 2002-03.

BISD spends over $237 million, or 73.4 percent of its total budget, on payroll costs. **Exhibit 3-4** details payroll costs in comparison to other expenditures.

Exhibit 3-4
BISD Budgeted Expenditures by Object Group
2001-02

Expenditure Category	Budgeted Amount	Percent of Total
Payroll Costs	$237,381,411	73.4%
Contracted Services	$19,185,444	5.9%
Supplies and Materials	$23,605,768	7.3%
Capital Outlay Expenses	$23,721,284	7.3%
Other Operating Expenses	$7,494,272	2.3%
Debt Service	$12,263,120	3.8%

Total	**$323,651,299**	**100.0%**

Exhibit 3-5 presents the number and percent of total staff for each staffing category from 1998-99 through 2001-02. Both the number and percent of campus administrators, central administrators and education aides increased. The percent of professional support staff and auxiliary staff decreased slightly, but in general all numbers have increased.

Exhibit 3-5
BISD Number of FTE Employees and Percent of Total Staff
1998-99 through 2001-02

Classification of Staff	1998-99		1999-2000		2000-01		2001-02	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Teachers	2,684.1	44.2%	2,740.2	44.4%	2,736.5	44.4%	2,912.4	44.4%
Professional Support	483.5	8.0%	504.8	8.2%	522.3	8.5%	545.2	8.3%
Campus Administrators	123.0	2.0%	121.9	2.0%	119.7	1.9%	143.9	2.2%
Central Administrators	22.1	0.4%	23.0	0.4%	23.0	0.4%	44.6	0.7%
Education Aides	803.4	13.2%	756.5	12.3%	731.6	11.9%	816.4	12.5%
Auxiliary Staff	1,956.5	32.2%	2,023.1	32.8%	2,026.2	32.9%	2,092.8	31.9%
Total Staff	**6,072.6**	**100%**	**6169.5**	**100%**	**6,159.3**	**100%**	**6,555.3**	**100%**

Exhibit 3-6 shows the ethnic composition of the district's teaching staff, which is 81.3 percent Hispanic. The high percentage of Hispanic teachers reflects the high percentage of Hispanic students, which is currently 97.7 percent.

Exhibit 3-6
Ethnicity of BISD Teachers
1998-99 through 2001-02

Ethnicity	1998-99		1999-2000		2000-01		2001-02	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
African American	12.0	0.4%	11.0	0.4%	8.6	0.3%	7.0	0.2%
Hispanic	2,072.4	77.2%	2,174.5	79.4%	2,208.4	80.7%	2,367.8	81.3%
Anglo	584.7	21.8%	543.7	19.8%	511.4	18.7%	525.9	18.1%
Other	15.0	0.6%	11.0	0.4%	8.0	0.3%	11.7	0.4%
Total	**2,684.1**	**100%**	**2,740.2**	**100%**	**2,736.4**	**100%**	**2,912.4**	**100%**

Source: TEA, AEIS, 1998-99 through 2000-01 and PEIMS, 2001-02.

FINDING

The structure of the Human Resources Department is inefficient and carries redundant positions. In 2001-02, the 41 employees of the Human Resources Department supported 6,555.3 full time equivalent (FTE) employees, with a ratio of 159.9 FTE district employees for every Human Resources Department employee. General industry staffing is 200 to 300 employees for every personnel department employee. This ratio does not include staff development employees or insurance employees. But if these positions were included, the ratio of total staff to HR employees would be 111.1 FTE district employees for every Human Resources Department and related employees.

Human Resources is divided into two departments: Certified Personnel and Classified Personnel. The Certified Personnel Department is led by an administrator. The department focuses on teachers, campus and central office administrators and other professional personnel. It has four Personnel specialists that perform specific functions. One specialist is responsible for job descriptions and evaluations, another for certification, another for immigration and absences and the last for investigations and sexual harassment.

The Classified Personnel Department is also led by an administrator. This department's efforts are focused on paraprofessional and auxiliary personnel. It has two specialist positions: one for job descriptions and one for investigations. In addition, a Policy and Procedure specialist reports directly to the area superintendent of Human Resources.

Having personnel functions separated out like this leads to a duplication of duties. Both departments have specialist positions responsible for job descriptions and investigations, and both have clerks responsible for processing applications. The Certified Personnel Department has six Personnel Accounting staff to maintain employee information in the human resource system and to administer salaries. The Classified Personnel Department has five personnel officer positions to complete the same functions. Between the two departments, there are two receptionists, nine secretaries and 13 clerks.

In addition to the overstaffing, the district's current human resource structure is lacking continuity. Many personnel functions are performed by departments other than Human Resources. For example, the Finance Department oversees the Insurance and Safety Department which administers employee group insurance, workers' compensation and employee safety training. The Curriculum and Instruction Department oversees most of the professional development of staff. Similarly, the Food Services Department has two staff employees dedicated to human resource functions. The Policy and Procedures Specialist, whose job responsibilities are primarily writing departmental and districtwide Personnel Handbooks, resides in the Public Information Office. While dividing such responsibilities with other departments is not uncommon in Texas school districts, this fragmentation of duties requires a considerable amount of coordination and diligent oversight to ensure all human resource duties are administered effectively and that tasks are not duplicated in the various departments.

One of the primary goals of human resource departments is to ensure the most efficient and effective use of personnel within the budget constraints of the employer. The Human Resources Department is charged with ensuring this across all departments of the organization department. The existence of multiple positions performing the same functions and the need for constant communication across departments shows that the Human Resource Department is not following its own goals within its own department.

A human resource department is normally responsible for recruitment, hiring, retention, compensation and staff planning, salary, leave and benefits administration, employee relations, staff development and safety programs. An effective human resource department ensures that all these functions are completed and in compliance with all local, state and federal laws and policies governing personnel issues. Many districts accomplish this with centralized control to ensure that all critical human resource functions are conducted successfully.

Recommendation 25:

Centralize personnel and human resources functions under a single Human Resources Department and eliminate excess staff.

The Insurance and Risk Management Department and the Professional Development Department should be absorbed by the Human Resources Department. The Staff Development administrator will continue serving a managerial role and retain all the same duties, but the administrator will report to the area superintendent of Human Resources rather than the assistant superintendent of Curriculum and Instruction. The Benefits administrator's duties could be expanded to include overseeing compensation and benefits, and, consequently, the position's title could be renamed the Compensation and Benefits administrator. Classified and Certified Personnel administrators should be restructured in order to merge staffing and employee relations issues districtwide. One of these administrators should be named the Human Resources administrator, while the other should be called the Professional Standards administrator.

The Classified Personnel Department and Certified Personnel Department will no longer operate as two separate departments. The specialist, personnel officer and clerk positions will be realigned based on functions. The Professional Standards Department will handle certifications, investigations, grievances, applications and criminal background and reference checks. The Human Resources Department will handle job descriptions, policies and procedures, evaluations, substitutes and personnel records. The Insurance and Safety Department will be moved under Human Resources and include compensation; the new department will be called Compensation and Benefits. The Personnel Accounting manager and Personnel Accounting clerks will move to the Compensation and Benefits Department. The Professional Development Department will also be moved under Human Resources.

The Policy and Procedure specialist will be report to the new Human Resources Administrator instead of directly to the area superintendent of Human Resources. The Staff Development coordinator in Food Services will be moved to the Professional Development Department in Human Resources. The board secretary should be moved to the superintendent's office since that position is not associated with human resource functions and is more appropriately placed in that office.

The vacant specialist position and two personnel officer positions should be eliminated since the duties assigned to these positions are redundant. The remaining personnel officers will need to be retrained to support their departments. All specialist secretary positions should be eliminated. In total, the reorganization will result in the elimination of 8 positions. Two of these positions are vacant and should not be filled. **Exhibit 3-7** presents the proposed reorganization of Human Resources.

Exhibit 3-7
Proposed Reorganization of the Human Resources Department
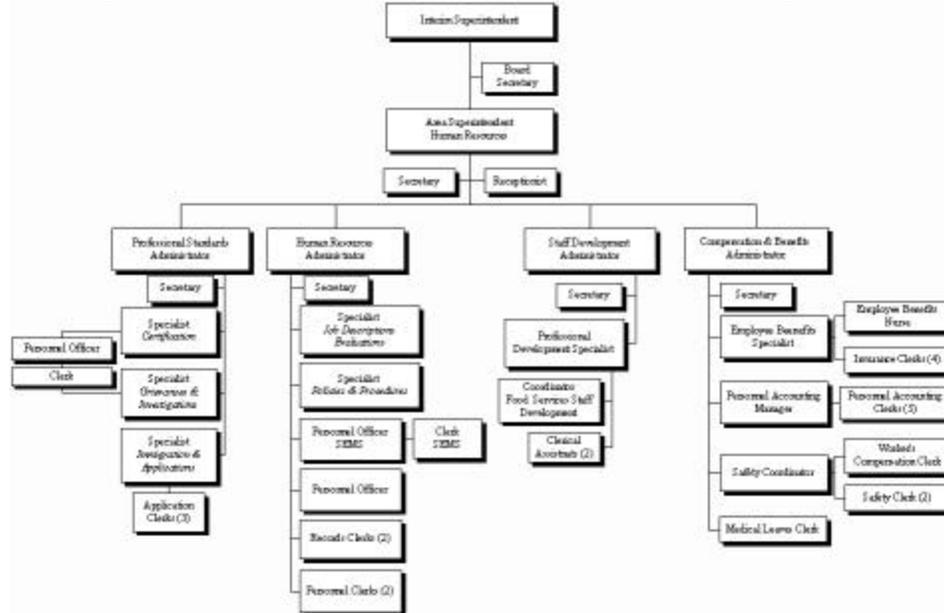
Source: TSPR.

Since duties of many of the positions will change, new job descriptions should be created to reflect the new duties.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The interim superintendent freezes vacant positions in Human Resources.	Immediately
2.	The area superintendent of Human Resources creates a reorganization plan for the Human Resources Department.	March 2003
3.	The administrators of Professional Standards, Human Resources, Staff Development and Compensation and Benefits create job descriptions for all proposed employees, using the TASB models for experience and education.	March 2003
4.	The area superintendent of Human Resources submits the reorganization plan, job descriptions and staffing recommendations to the board for approval.	April 2003
5.	The board approves the plan, job descriptions and staffing recommendations.	May 2003
6.	The area superintendent of Human Resources announces the changes in the department.	May 2003
7.	The area superintendent of Human Resources eliminates 8	August 2003

	positions and implements the other sections of the approved plan.	
8.	The area superintendent of Human Resources periodically reevaluates the organization and staffing of the Human Resource Department.	August 2003 and Ongoing

FISCAL IMPACT

Eliminating excess staff will result in an annual savings of $254,011 ($74,992 + $48,641 + $130,378) as calculated below.

Eliminating one personnel specialist position will result in a savings of $74,992 annually. These savings are calculated by taking the average annual salary of the personnel specialists and adding annual benefits ([$63,847 annual salary x 1.12 variable benefits] + $3,483 fixed benefits = $74,992).

Eliminating two personnel officer positions will result in a savings of $48,641 annually. These savings are calculated by taking the average annual salary of the personnel officers and adding annual benefits ([$18,605 annual salary x 1.12 variable benefits] + $3,483 fixed benefits x 2 positions = $48,641).

Eliminating the five specialist secretary positions will result in a savings of $130,378 annually. These savings are calculated by taking the average annual salary of the specialist secretaries and adding annual benefits ([$20,172 annual salary x 1.12 variable benefits] + $3,483 fixed benefits x 5 positions = $130,378).

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Centralize personnel and human resources functions under a single Human Resources Department and eliminate excess staff.	$254,011	$254,011	$254,011	$254,011	$254,011

FINDING

Performance appraisals are not always completed within the time frame required. Texas Education Code (TEC) 21.352 states that classroom teachers must be evaluated at least once during each school year and TEC 21.354 states that district funds may not be used to pay an administrator who has not been evaluated in the past 15 months. The review team examined a random sampling of both certified and classified employee

files and found several employees had not had an evaluation for over 15 months, which exceeds the state law of performing evaluations at least annually. The most recent evaluation documentation in some of the employee files examined was dated 2000. The Certified Personnel administrator presented a spreadsheet showing that the evaluations of teachers are tracked for completion. The Classified Personnel administrator presented documentation that evaluations of at-will employees assigned to campuses are tracked for completion, too. Documentation was not provided to show that evaluations of other certified and classified personnel are tracked.

Not performing appraisals deprives the district of a valuable tool in employee management. District administration is unable to accurately determine performance levels when making decisions regarding promotion and termination. Performance appraisals are often used as evidence in grievance and employee litigation proceedings to support employment decisions. If the district does not have performance appraisals, supporting their position that employment actions were based on performance is difficult for the district administration. In addition, employees rely on annual evaluations to determine their progress on the job. Not providing employees formal feedback on areas that need improvement denies the employee the opportunity to improve skills.

Many employers perform written evaluations of every employee at least once a year, and most school districts ensure that all teacher and administrator evaluations are performed according to statute requirements.

Recommendation 26:

Ensure annual written performance appraisals are completed for all employees.

The district should ensure that written performance evaluations are completed on each employee at least annually and should offer training to supervisory employees in the completion of evaluations and techniques.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The area superintendent of Human Resources and the Classified and Certified Personnel administrators create a schedule for completion of performance appraisals for different classes of employees and submit it to the interim superintendent for approval.	March 2003
2.	The interim superintendent approves the schedule and instructs supervisory employees to complete evaluations in accordance	April 2003

	with the schedule.	
3.	The area superintendent of Human Resources, or the appropriate Personnel administrator, offers training to supervisory employees on how to complete performance evaluations.	May 2003
4.	Supervisory employees complete appraisals according to the schedule.	May 2003 and Ongoing
5.	The Human Resources Department tracks evaluations to ensure that the schedule is being followed and monitors evaluations to ensure each employee is evaluated annually.	Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 3
HUMAN RESOURCES MANAGEMENT

B. STAFFING PATTERNS, SALARIES AND BENEFITS (PART 1)

BISD's largest expenditure is payroll. The management of staffing, salaries and benefits has a profound effect on the amount of money available for other programs; the more efficiently payroll costs are controlled the more flexibility a district has in distributing funds to necessary programs especially in the classroom.

Exhibit 3-8 shows staffing trends in the district from 1997-98 through 2001-02. The number of educational aides has decreased, while all other categories of staff have increased. The largest percentage increases is found in central administration and the largest number increase is found in auxiliary staff.

Exhibit 3-8
Staffing Trends
1997-98 through 2001-02

Staff	1997-98	1998-99	1999-2000	2000-01	2001-02	Percent Change 1997-98 through 2001-02	Number Change 1997-98 through 2001-02
Teachers	2,698.8	2,684.1	2,740.2	2,736.5	2,912.4	7.9%	213.6
Professional Support	464.3	483.5	504.8	522.3	545.2	17.4%	80.9
Campus Administrators	124.8	123.0	121.9	119.7	143.9	15.3%	19.1
Central Administration	19.0	22.1	23.0	23.0	44.6	134.7%	25.6
Education Aides	892.0	803.4	756.5	731.6	816.4	(8.5%)	(75.6)
Auxiliary Staff	1,851.3	1,956.5	2,023.1	2,026.2	2,092.8	13.0%	241.5
Total Staff	**6,050.2**	**6,072.6**	**6,169.5**	**6,159.3**	**6,555.3**	**8.3%**	**505.1**

Source: TEA, AEIS, 1997-98 through 2000-01 and PEIMS, 2001-02.

Exhibit 3-9 compares student enrollment and total staff from 1997-98 through 2001-02. Student enrollment has increased by 5.5 percent while total staff has increased by 8.3 percent.

Exhibit 3-9
Student Enrollment and Staffing Changes
1997-98 through 2001-02
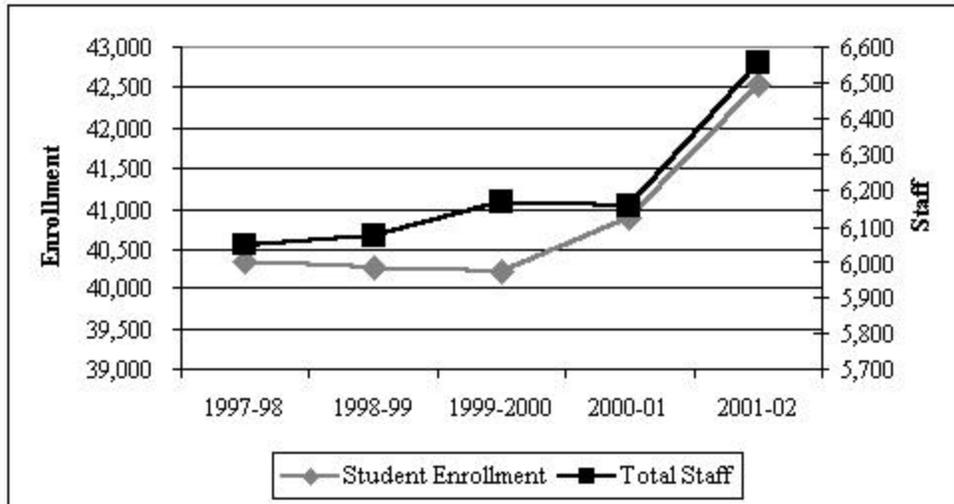
Source: TEA, AEIS, 1997-98 through 2000-01 and PEIMS, 2001-02.

Exhibit 3-10 presents percent of staff by category for BISD, peer districts and the state for 2001-02. The chart shows that BISD had the second lowest percentage of teachers and the highest percentage of auxiliary personnel when compared to peer districts. The percent of teachers, 44.4 percent, is well below the state average of 50.5 percent and the percent of auxiliary staff, 31.9 percent, is significantly higher than the state average of 26.5 percent. Although the percent of teachers appears low, it is noted that the students per teacher ratio is very close to the state average of 14.7 students per teacher.

Exhibit 3-10
BISD, Peers and State
2001-02 Percent of Staff by Category

District	Teachers	Professional Support	Campus Admin.	Central Admin.	Educational Aides	Auxiliary Staff	Students per Teacher
Brownsville	**44.4%**	**8.3%**	**2.2%**	**0.7%**	**12.5%**	**31.9%**	**14.6**
Corpus Christi	48.8%	8.7%	2.9%	1.4%	11.0%	27.2%	16.2

Laredo	42.7%	8.5%	2.4%	0.4%	15.7%	30.3%	16.0
North East	51.3%	8.8%	2.3%	1.0%	9.3%	27.3%	14.9
Plano	60.0%	9.6%	2.4%	1.0%	10.7%	16.3%	13.9
Ysleta	51.1%	6.6%	2.3%	0.7%	8.6%	30.8%	15.7
State	**50.5%**	**8.9%**	**2.7%**	**1.0%**	**10.3%**	**26.5%**	**14.7**

Source: TEA, PEIMS, 2001-02.

Exhibit 3-11 provides salary schedule information for teachers.

Exhibit 3-11
Teacher Salary Schedule
2001-02

Years Experience	Bachelor's Degree Salary
0	$30,500
1	$31,200
2	$31,886
3	$32,572
4	$33,258
5	$33,944
6	$34,630
7	$35,316
8	$36,002
9	$36,688
10	$37,374
11	$38,060
12	$38,746
13	$39,432
14	$40,118
15	$40,804
16	$41,490

17	$42,176
18	$42,862
19	$43,548
20	$44,234
Secondary Math and Science	$1,000
Master's Degree	$3,000
Special Education	$1,500
Counselors	$2,000

Source: BISD Salary Structures, May 2002.

FINDING

BISD has developed a comprehensive handbook for employees. *The Personnel Handbook* was approved by the board on September 17, 2002. The manual includes a detailed listing of the contents of the book and appropriate appendices to the various departments in the district. Each handbook includes an Employee Acknowledgment Form for the employee to sign and return to the Human Resources Department. Recently, the BISD Web site has been modified to include links which show more detail on each policy. These links have made the handbook more effective by providing employees easy access to supporting information. Contact information and other Web sites that employees may find useful are also included when appropriate.

Exhibit 3-12 provides a sample of policies that are included in the Personnel Handbook. The new handbook is very comprehensive and covers key areas such as promotions, grievances, leave of absence, and performance appraisals.

Exhibit 3-12
BISD Personnel Policy Samples
Approved September 17, 2002
2002-03

Policy Name	Class of Employee Impacted
Employment Practices	All
Nepotism	All
Types of State Personal Leave	All

Complaints and Grievances	All
Sexual Harassment	All
Probationary Contracts	Certified
Administrative Leave	Certified
Absenteeism and Tardiness	Classified
Employment At-Will	Classified
Overtime	Classified
Termination	Classified

Source: BISD Personnel Handbook, 2002-03.

The handbook is user-friendly and provides a very good reference to employees with specific questions concerning district human resource practices. and employees to receive information since it is found in the handbook

COMMENDATION

BISD provides employees with a comprehensive, user-friendly personnel handbook.

FINDING

BISD is overstaffed in auxiliary personnel and campus administration. For the purposes of PEIMS, reporting auxiliary personnel include custodial, maintenance, transportation, food service and clerical staff and campus administration includes principals and assistant principals. The district is aware of staffing allocation formulas to determine staffing needs but does not always adhere to them. The district currently uses the state mandated 22:1 student-to-teacher ratio for elementary grades; 16:1 for middle schools; and 21:1 for high schools. **Exhibit 3-13** shows district staffing counts and ratios for all classes of employees for BISD and peer districts. BISD has the fourth largest enrollment, as well as the largest number of educational aides and auxiliary staff of its peer group. The ratio of students to auxiliary staff is the lowest of the peer districts; however the ratio of students to teachers is the second lowest of the peer districts. BISD has the third lowest ratio of students per campus administrator. Generally, having a low student-to-teacher ratio and a high student-to-support-staff ratio is preferred.

Exhibit 3-13
BISD and Peer Districts Staff and Student Enrollment and Staffing

Ratios
2001-02

Professional Staff	Brownsville	Corpus Christi	Laredo	North East (San Antonio)	Plano	Ysleta
Student Enrollment	**42,541**	39,383	23,188	53,030	48,944	46,742
Teachers	**2,912.4**	2,429.3	1,445.4	3,548.7	3,528.3	2,986.5
Professional Support	**545.2**	434.6	289.3	607.4	565.5	384.9
Educational Aides	**816.4**	550.0	530.9	642.2	626.4	502.3
Campus Administration	**143.9**	142.6	80.8	160.6	140.7	133.0
Central Administration	**44.6**	67.9	13.0	66.8	61.5	39.0
Auxiliary Staff	**2,092.8**	1,355.8	1,024.9	1,888.9	958.2	1,797.9
Students per Staff Comparison						
Students per Teacher	**14.6**	16.2	16.0	14.9	13.9	15.7
Students per Prof. Support	**78.0**	90.6	80.2	87.3	86.5	121.4
Students per Educational Aide	**52.1**	71.6	43.7	82.6	78.1	93.1
Students per School Admin.	**295.6**	276.2	287.0	330.2	347.9	351.4
Students per Central Admin.	**953.8**	580.0	1,783.7	793.9	795.8	1,198.5
Students per Auxiliary Staff	**20.3**	29.0	22.6	28.1	51.1	26.0

Source: TEA, PEIMS, 2001-02.

The Southern Association of Schools and Colleges (SACS) accredits more than 12,000 public and private institutions, from pre-kindergarten through the university level, in 11 states in the Southeastern United States (including Texas) and in Latin America. SACS is one of only six such

regional accrediting organizations in the United States recognized by the U.S. Department of Education. Member institutions are accredited through one of SACS' three commissions, the Commission on Colleges, the Commission on Secondary and Middle Schools and the Commission on Elementary and Middle Schools.

Based on research and best practices in effective schools, the SACS standards were developed by a team of professionals that obtained input from representatives throughout the southern states. The standards present a common core of expectations that help to develop and maintain quality schools.

Exhibits 3-14, 3-15 and **3-16** present the SACS accreditation standards for campus support staffing in elementary, middle and high schools.

Exhibit 3-14
SACS Accreditation Standards for
Campus Non-teaching Staff
Elementary Schools
2001-02

Enrollment	Principal	Assistant Principal	Librarians or Media Specialist	Library or Media Aide	Secretaries and Clerks
1-263	0.5	0.0	0.5	0.0	0.5
264-439	1.0	0.0	1.0	0.0	1.0
440-659	1.0	0.0	1.0	0.5	1.0
660-879	1.0	0.5	1.0	1.0	1.5
880-1099	1.0	1.0	1.0	1.0	1.5
1100-1319	1.0	1.5	1.0	1.0	2.0
1320-up	1.0	2.0	1.0	1.0	2.0

Source: SACS Checklist of Standards for the Accreditation of Elementary Schools, 2001-02.

Exhibit 3-15
SACS Accreditation Standards for
Campus Non-teaching Staff
Middle Schools
2001-02

Enrollment	Principal	Assistant	Librarians or	Library or	Secretaries

		Principal	Media Specialist	Media Aide	and Clerks
1-249	1.0	0.0	0.5	0.0	0.5
250-499	1.0	0.5	1.0	0.5	1.0
500-749	1.0	1.0	1.0	1.0	1.5
750-999	1.0	1.0	1.0	1.0	1.5
1,000-1,249	1.0	1.5	1.0	1.0	2.0
1,250-1,499	1.0	2.0	1.0	1.0	2.0
1,500-up	1.0*	2.0*	1.0*	1.0	2.0

Source: SACS Additional Standards Unique to Middle Schools, 2001-02.
* Plus one FTE where needed for each 250 students over 1500.

Exhibit 3-16
SACS Accreditation Standards for
Campus Non-teaching Staff
High Schools

Enrollment	Principal	Assistant Principal	Librarians or Media Specialist	Library or Media Aide	Secretaries and Clerks
1-249	1.0	0.0	1.0	0.0	1.0
250-499	1.0	0.5	1.0	0.5	2.0
500-749	1.0	1.0	1.0	1.0	3.0
750-999	1.0	1.5	1.0	1.0	3.5
1,000-1,249	2.0	2.0	2.0	1.0	4.0
1,250-1,499	2.0	2.5	2.0	1.0	4.5
1,500-up	2.0*	2.5*	2.0*	1.0	4.5

Source: SACS High School Accreditation Standards, 2000.
* Plus one FTE where needed for each 250 students over 1500.

Chapter 3
HUMAN RESOURCES MANAGEMENT

B. STAFFING PATTERNS, SALARIES AND BENEFITS (PART 2)

Exhibit 3-17 presents BISD clerical staffing by campus compared to the SACS standard. The number of clerical staff per campus is significantly higher than the industry standard.

Exhibit 3-17
Campus Clerical Staffing
BISD versus SACS Standards

Campus	Enrollment	Secretaries or Clerks			Library Aide or Media Clerk			Total
		BISD	SACS	Over (Under)	BISD	SACS	Over (Under)	Over (Under)
Hanna High	2,613	20.0	4.5	**15.5**	3.0	1.0	**2.0**	**17.5**
Lopez High	1,735	12.0	4.5	**7.5**	2.0	1.0	**1.0**	**8.5**
Pace High	1,952	17.0	4.5	**12.5**	2.0	1.0	**1.0**	**13.5**
Porter High	1,870	16.0	4.5	**11.5**	2.0	1.0	**1.0**	**12.5**
Rivera High	1,903	13.0	4.5	**8.5**	2.0	1.0	**1.0**	**9.5**
Cameron County JJAEP	15	3.0	0.0	**3.0**	0.0	0.0	**0.0**	**3.0**
Lincoln Park School	154	3.0	1.0	**2.0**	1.0	0.0	**1.0**	**3.0**
Besteiro Middle	1,101	8.0	2.0	**6.0**	1.0	1.0	**0.0**	**6.0**
Central Middle	828	7.0	1.5	**5.5**	1.0	1.0	**0.0**	**5.5**
Cummings Middle	936	7.2	1.5	**5.7**	1.0	1.0	**0.0**	**5.7**
Faulk Middle	907	7.0	1.5	**5.5**	1.0	1.0	**0.0**	**5.5**
Lucio	995	7.0	1.5	**5.5**	1.0	1.0	**0.0**	**5.5**

Middle							
Oliveira Middle	1,204	8.0	2.0	**6.0**	1.0	1.0	**0.0**	**6.0**
Perkins Middle	1,181	9.0	2.0	**7.0**	1.0	1.0	**0.0**	**7.0**
Stell Middle l	992	9.0	1.5	**7.5**	0.0	1.0	**(1.0)**	**6.5**
Vela Middle	1,238	6.8	2.0	**4.8**	2.0	1.0	**1.0**	**5.8**
Aiken Elementary	800	4.0	1.5	**2.5**	1.0	1.0	**0.0**	**2.5**
Benavides Elementary	802	3.0	1.5	**1.5**	1.0	1.0	**0.0**	**1.5**
Burns Elementary	983	4.0	1.5	**2.5**	1.0	1.0	**0.0**	**2.5**
Canales Elementary	776	5.0	1.5	**3.5**	1.0	1.0	**0.0**	**3.5**
Castaneda Elementary	597	3.0	1.0	**2.0**	1.0	1.0	**0.0**	**2.0**
Champion Elementary	717	3.0	1.5	**1.5**	1.0	1.0	**0.0**	**1.5**
Clearwater Elementary	388	3.0	1.0	**2.0**	1.0	0.5	**0.5**	**2.5**
Cromack Elementary	834	3.0	1.5	**1.5**	1.0	1.0	**0.0**	**1.5**
Del Castillo Elementary	556	3.0	1.0	**2.0**	1.0	1.0	**0.0**	**2.0**
Egly Elementary	968	8.0	1.5	**6.5**	2.0	1.0	**1.0**	**7.5**
El Jardin Elementary	951	5.0	1.5	**3.5**	1.0	1.0	**0.0**	**3.5**
Gallegos Elementary	592	3.0	1.0	**2.0**	1.0	1.0	**0.0**	**2.0**
Garden Park Elementary	820	4.0	1.5	**2.5**	1.0	1.0	**0.0**	**2.5**

School								
Garza Elementary	831	4.0	1.5	**2.5**	1.0	1.0	**0.0**	**2.5**
Gonzalez Elementary	1,070	4.0	1.5	**2.5**	1.0	1.0	**0.0**	**2.5**
Hudson Elementary	871	3.0	1.5	**1.5**	1.0	1.0	**0.0**	**1.5**
Longoria Elementary	458	3.0	1.0	**2.0**	0.5	0.5	**0.0**	**2.0**
Martin Elementary	674	3.0	1.5	**1.5**	1.0	1.0	**0.0**	**1.5**
Morningside Elementary	849	4.0	1.5	**2.5**	1.0	1.0	**0.0**	**2.5**
Palm Grove Elementary	551	3.0	1.0	**2.0**	2.0	1.0	**1.0**	**3.0**
Parades Elementary	638	4.0	1.5	**2.5**	1.0	1.0	**0.0**	**2.5**
Perez Elementary	592	3.0	1.0	**2.0**	1.0	1.0	**0.0**	**2.0**
Putegnat Elementary	593	1.0	1.0	**0.0**	1.0	1.0	**0.0**	**0.0**
Resaca Elementary	386	2.0	1.0	**1.0**	1.0	0.5	**0.5**	**1.5**
Russell Elementary	899	4.0	1.5	**2.5**	1.0	1.0	**0.0**	**2.5**
Sharp Elementary	496	3.0	1.0	2.0	1.0	0.5	**0.5**	**2.5**
Skinner Elementary	640	3.0	1.0	**2.0**	1.0	1.0	**0.0**	**2.0**
Southmost Elementary	698	3.0	1.5	**1.5**	1.0	1.0	**0.0**	**1.5**
Vermillion Elementary	997	5.0	1.5	**3.5**	1.0	1.0	**0.0**	**3.5**
Victoria Heights Elementary	635	3.0	1.0	**2.0**	1.0	1.0	**0.0**	**2.0**
Villa Nueva Elementary	432	2.0	1.0	**1.0**	1.0	0.5	**0.5**	**1.5**

Yturria Elementary	823	3.0	1.5	**1.5**	1.0	1.0	**0.0**	1.5
Total	**42,541**	**264.0**	**80.5**	**183.5**	**54.5**	**43.5**	**11.0**	**194.5**

Exhibit 3-18 presents BISD campus administration staffing by campus compared to SACS standard. The number of assistant principals per campus is higher than the industry standard at most schools.

Exhibit 3-18
Campus Administration
BISD versus SACS Standards

Campus	Enrollment	Principal			Assistant Principals			
		BISD	SACS	Over (Under)	BISD	SACS	Over (Under)	Over (Under)
Hanna High School	2,613	1.0	1.0	0.0	6.0	6.5	(0.5)	(0.5)
Lopez High School	1,735	1.0	1.0	0.0	4.0	2.5	1.5	1.5
Pace High School	1,952	1.0	1.0	0.0	5.0	3.5	1.5	1.5
Porter High School	1,870	1.0	1.0	0.0	4.0	3.5	0.5	0.5
Rivera High School	1,903	1.0	1.0	0.0	5.0	3.5	1.5	1.5
Cameron County JJAEP	15	1.0	1.0	0.0	0.0	0.0	0.0	0.0
Lincoln Park School	154	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Besteiro Middle School	1,101	1.0	1.0	0.0	3.0	1.5	1.5	1.5
Central	828	1.0	1.0	0.0	2.0	1.0	1.0	1.0

Middle School							
Cummings Middle School	936	1.0	1.0	0.0	2.0	1.0	1.0	1.0
Faulk Middle School	907	1.0	1.0	0.0	2.0	1.0	1.0	1.0
Lucio Middle School	995	1.0	1.0	0.0	2.0	1.0	1.0	1.0
Oliveira Middle School	1,204	1.0	1.0	0.0	3.0	1.5	1.5	1.5
Perkins Middle School	1,181	1.0	1.0	0.0	2.0	1.5	0.5	0.5
Stell Middle School	992	1.0	1.0	0.0	2.0	1.0	1.0	1.0
Vela Middle School	1,238	1.0	1.0	0.0	2.0	1.5	0.5	0.5
Aiken Elementary	800	1.0	1.0	0.0	2.0	0.5	1.5	1.5
Benavides Elementary	802	1.0	1.0	0.0	2.0	0.5	1.5	1.5
Burns Elementary	983	1.0	1.0	0.0	2.0	1.0	1.0	1.0
Canales Elementary	776	1.0	1.0	0.0	1.0	0.5	0.5	0.5
Castaneda Elementary	597	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Champion Elementary	717	1.0	1.0	0.0	1.0	0.5	0.5	0.5
Clearwater Elementary	388	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Cromack	834	1.0	1.0	0.0	2.0	0.5	1.5	1.5

Elementary							
Del Castillo Elementary	556	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Egly Elementary	968	1.0	1.0	0.0	2.0	1.0	1.0	1.0
El Jardin Elementary	951	1.0	1.0	0.0	2.0	1.0	1.0	1.0
Gallegos Elementary	592	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Garden Park Elementary	820	1.0	1.0	0.0	2.0	0.5	1.5	1.5
Garza Elementary	831	1.0	1.0	0.0	2.0	0.5	1.5	1.5
Gonzalez Elementary	1,070	1.0	1.0	0.0	2.0	1.0	1.0	1.0
Hudson Elementary	871	1.0	1.0	0.0	2.0	0.5	1.5	1.5
Longoria Elementary	458	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Martin Elementary	674	1.0	1.0	0.0	1.0	0.5	0.5	0.5
Morningside Elementary	849	1.0	1.0	0.0	2.0	0.5	1.5	1.5
Palm Grove Elementary	551	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Parades Elementary	638	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Perez Elementary	592	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Putegnat Elementary	593	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Resaca Elementary	386	1.0	1.0	0.0	0.0	0.0	0.0	0.0
Russell Elementary	899	1.0	1.0	0.0	2.0	1.0	1.0	1.0
Sharp	496	1.0	1.0	0.0	0.0	0.0	0.0	0.0

Elementary								
Skinner Elementary	640	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Southmost Elementary	698	1.0	1.0	0.0	0.0	0.5	(0.5)	(0.5)
Vermillion Elementary	997	1.0	1.0	0.0	2.0	1.0	1.0	1.0
Victoria Heights Elementary	635	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Villa Nueva Elementary	432	1.0	1.0	0.0	1.0	0.0	1.0	1.0
Yturria Elementary	823	1.0	1.0	0.0	1.0	0.5	0.5	0.5
Total	**42,541**	**48.0**	**48.0**	**0.0**	**87.0**	**42.5**	**44.5**	**44.5**

Source: TEA, PEIMS, 2001-02, SACS Accreditation Standards and BISD Staffing Report.

In addition, the district has 45 administrator level or higher positions in non-campus administration that have 76 non-campus secretary positions supporting them. Secretary positions are considered auxiliary personnel for PEIMS purposes. Generally, the number of secretaries is less than or equal to the number of administrator level or higher positions.

Using SACS or other industry standards based on quantifiable criteria, such as student enrollment, square footage and meals per labor hour, to determine and project staffing needs allows districts to accurately project payroll and benefits costs and predict budgetary needs. These quantifiable methods of determining the number of positions available for each class of employee and for each campus serve as an aid in position control. Budgetary constraints can also be factored into staffing projections. When districts use staffing allocation formulas, the districts benefit with a better planning tool for establishing staffing needs, especially when enrollment increases or decreases.

Recommendation 27:

Use staffing allocation formulas to determine the number of positions within each department and eliminate excess positions.

The district needs to adopt staffing allocation formulas that are in line with industry standards and averages for each class of employee and adhere to

them. All future positions should be created only when the adopted allocation formulas indicate the need for additional employees.

To begin to address the overstaffing issue, the district should reduce clerical staffing at campuses and in central administration departments. According to SACS, the district is overstaffed by 194.5 campus clerical positions. The review team recommends reducing this number by 30 percent to allow for PEIMS reporting and other special needs of the district and only eliminate 136 positions (194.5 positions X 70 percent = 136.2 positions).

The district is overstaffed in assistant principals by 44.5 positions. Recognizing that BISD has a large at-risk student population, the reduction of assistant principals has been reduced by 30 percent. With the 30 percent allowance the district should be able to conservatively achieve the savings while not adversely impacting the district's at-risk students. Therefore, the review team recommends rounding this number down to 31 positions (44.5 positions X 70 percent = 31.15 positions).

In addition the district should eliminate 30 secretary positions in non-campus settings. This would leave one secretary for each administrator level or higher position and one secretary for the board. Overstaffing in maintenance and custodial employees will be discussed in Chapter 5, *Facilities Use and Management.*

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent immediately freezes hiring to reduce the number of employees that may have to be terminated.	March 2003
2.	The area superintendent of Human Resources conducts research and identifies appropriate staffing allocation formulas for each class of position.	March 2003
3.	The area superintendent of Human Resources and the Chief Financial Officer review staffing allocation formulas and determine the specific campus and non-campus positions to be eliminated.	March 2003
4.	The area superintendent of Human Resources submits position elimination recommendations to the board for approval.	April 2003
5.	The board approves the position eliminations.	May 2003
6.	The area superintendent of Human Resources, with the assistance of the Human Resource administrators, implements the position eliminations.	June 2003

7.	The area superintendent of Human Resources uses the staffing allocation formulas as a guide in determining staffing needs and creating new positions.	Ongoing

FISCAL IMPACT

Eliminating excess positions will result in an annual savings of $5.2 million ($2,410,437 +$2,180,132 + $648,223) calculated below. Average salaries for clerical and non-campus administrative secretary positions are estimated based on district data. Average salaries for assistant principals positions are based on the average salary for BISD campus administration positions as reported in PEIMS.

Eliminating 136 campus clerical positions will result in the savings of $2,410,437 annually. These savings are calculated by taking the average annual salary for employees on pay grade CA-12, 187 days and adding annual benefits ([$12,715 annual salary x 1.12 variable benefits] + $3,483 fixed benefits x 136 positions = $2,410,437). This is a conservative calculation since the $12,715 annual salary is at the lower range of salaries for most of the clerk positions at the campus level. Some positions are paid on higher or lower pay grades or for more days.

Eliminating 31 assistant principal positions will result in the savings of $2,180,132 annually. These savings are calculated by taking the average annual salary for campus administration as reported in PEIMS ([$59,682 annual salary x 1.12 variable benefits] + $3,483 fixed benefits x 31 positions = $2,180,132).

Five secretaries in the Human Resources Department were eliminated in an earlier recommendation reducing the number of secretary positions to be eliminated by this recommendation to 25.

Eliminating 25 non-campus administration secretary positions will result in the savings of $648,223 annually. These savings are calculated by taking the average annual salary for all Secretary V employees and adding annual benefits ([$20,041 annual salary x 1.12 variable benefits] + 3,483 fixed benefits x 25 positions = $648,223).

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Use staffing allocation formulas to determine the number of positions within each department and eliminate excess positions.	$5,238,792	$5,238,792	$5,238,792	$5,238,792	$5,238,792

Chapter 3
HUMAN RESOURCES MANAGEMENT

C. RECRUITMENT AND HIRING ACTIVITIES

In 2000, the district stopped taking recruitment trips. The district found that most trips were not successful and did not feel it was appropriate to continue spending budget dollars on recruitment trips. Since stopping recruiting trips, the district has invested budgeted dollars into advertising on web sites as well as recruitment through local universities.

Exhibit 3-19 shows the web sites where BISD advertises vacant teaching positions.

Exhibit 3-19
BISD Recruitment Web Sites
2002

Web Site	Web Address
BISD	**www.brownsville.isd.tenet.edu**
Teacher Wave	www.teacherwave.com
Region I	www.esc1.net
Texas Association of School Administrators	www.tasanet.org
Troop to Teachers	www.job2teach.doded.mil
School Staff Job	www.jobcontrolcenter.com
Texas Workforce Commission	www.twc.state.tx.us
American Association for Employment in Education	www.aaee.org
School Match	www.schoolmatch.com

Source: Interview with Certified Personnel Administrator, September 2002.

Exhibit 3-20 presents the teacher turnover rates for BISD and its peer districts. The district's teacher turnover rate is the lowest of its peers and the region and the state. With a turnover rate of 10 percent, the district must fill 291 existing teaching positions in addition to any new positions created by enrollment. In October 2002, the district's employment Web site listed four teaching vacancies.

Exhibit 3-20
BISD and Peer Districts Teacher Turnover Rates
1996-97 through 2000-01

District	1996-97	1997-98	1998-99	1999-200	2000-01
Brownsville	**9.3%**	**10.1%**	**10.6%**	**7.7%**	**10.0%**
Corpus Christi	9.4%	9.3%	15.4%	11.7%	11.2%
Laredo	8.1%	11.0%	10.5%	15.6%	16.6%
North East	10.0%	10.2%	10.3%	11.8%	10.6%
Plano	8.2%	12.4%	13.5%	16.9%	15.5%
Ysleta	12.6%	13.7%	13.6%	11.5%	12.5%
Region 1	**10.7%**	**12.1%**	**12.7%**	**13.4%**	**13.6%**
State	**12.6%**	**13.3%**	**15.5%**	**15.0%**	**16.0%**

Source: TEA, AEIS, 1996-97 through 2000-01.

Exhibit 3-21 presents the BISD and peer average salaries for professional employees, by category of professional employee. On average, BISD pays its teachers less than its peers and the state. Campus administrators are the second lowest paid as compared to its peers. Average actual salaries for other professional employees are compatible with peer districts.

Exhibit 3-21
Professional Staff Average Salary Comparison
BISD, Region, State and Peer Districts
2001-02

District	Teachers	Professional Support	Campus Administration	Central Administration
Brownsville	$38,990	$47,994	$59,682	$70,635
Corpus Christi	$40,458	$48,057	$58,190	$64,479
Laredo	$40,739	$47,015	$62,515	$79,102
North East	$42,966	$52,210	$66,682	$68,159
Plano	$41,155	$48,645	$66,364	$77,614
Ysleta	$39,136	$44,388	$60,552	$64,694
Region 1	**$38,795**	**$46,447**	**$57,774**	**$67,985**
State	**$39,232**	**$41,959**	**$58,561**	**$69,849**

Exhibit 3-22 presents BISD and peer district teacher salaries by level of experience. On average BISD pays its teachers less than most peers.

Exhibit 3-22
Teacher Salary Comparison
BISD, Region, State and Peer Districts
2001-02

District	Beginning	1-5 Years	6-10 Years	11-20 Years	Over 20 Years
Brownsville	$30,921	$32,681	$36,807	$41,961	$48,303
Corpus Christi	$30,150	$32,093	$34,842	$41,219	$49,715
Laredo	$31,096	$32,278	$36,237	$43,501	$50,731
North East	$34,589	$36,680	$39,642	$44,437	$53,515
Plano	$33,819	$35,595	$38,240	$43,948	$54,249
Ysleta	$27,908	$32,828	$35,926	$42,279	$50,305
Region 1	**$28,775**	**$31,821**	**$36,424**	**$43,545**	**$48,961**
State	**$30,940**	**$33,093**	**$36,169**	**$42,298**	**$49,185**

FINDING

The district does not consistently follow board approved hiring practices. In August 2002 the Internal Audit Department completed a special investigative audit of the district's hiring practices. The cover letter of the report states "management has circumvented procedures." **Exhibit 3-23** presents a summary of the audit findings.

Exhibit 3-23
Summary of Internal Investigative Audit Report
BISD Hiring Practices
2002

Position	Issue
Area 1 Superintendent	• The position was categorized as non-contractual and a term contract was issued. • Documentation was missing, incomplete or

	completed after hire date. • No documentation was found verifying employee met prerequisites.
Safety and Insurance Administrator	• Employee does not meet educational qualifications.* • No documentation was provided showing employee has required experience. • Application contained inaccurate information regarding the grade point average that was not verified prior to hire.*
Chief Financial Officer	• The position was categorized as non-contractual and a term contract was issued. • Employee does not meet educational qualifications. • Salary was increased without board approval. • Criminal background check was not conducted. • Documentation missing from file.
Administrator for Policy, Procedures and Information	• Employee does not have required experience and certifications. • Employee reported for duty one day after interviews were held. • Application for employment dated six weeks after hire date. • Authority to report to work dated after hire date. • TB test not completed until four months after hire.
Purchasing Administrator	• Discrepancies noted on years of experience, application indicates lower number of years than salary worksheet. Salary may be inflated. • No change of assignment form for reassignment to Purchasing from Payroll.
Former Assistant Superintendent for Administrative Services	• Employee did not have required experience or certificates for original assignment as area superintendent of Human Resources.

	area superintendent of Human Resources.
KBSD-TV Station Administrator	• Salary worksheet and payroll records do not agree. • Board meeting agenda documentation does not indicate specific salary as required. • Verification of previous employment not done. • Documentation missing or incomplete.
Workman Comp Loss Control Specialist	• Employee was hired as certified employee without paperwork then changed to classified employee status. • Position control did not show this position as available. • No documentation of education in file. • Work experience was not verified and references were not checked. • Criminal record check was completed six weeks after date of hire.

Source: BISD Internal Audit Report on Investigative Audit of Hiring Practices, August 2002.

The report also notes that relatives of a former area superintendent of Human Resources were hired without following the proper procedure and completing all necessary background checks. The current area superintendent of Human Resources said that most of the hiring practice violations were committed based on the instructions of the former area superintendent. This employee has since been put on leave by the district.

Several board policies address hiring practices. **Exhibit 3-24** presents a summary of those practices that the internal auditors found were not followed.

Exhibit 3-24
Summary of BISD
Board Policies Regarding Hiring of District Personnel

Policy Name	Policy
DAB (Local) Employment	The Board establishes the following objective criteria for decisions regarding the hiring, dismissal,

Objectives: Objective Criteria for Personnel Decisions	reassignment, promotion and demotion of District personnel. These criteria are not rank-ordered and may be considered in whole or in part in making such decisions. 1. Academic or technical preparation, supported by transcripts, preference to those with 2.5 GPA or above. 2. Proper certification for grade level, subject, or assignment, including emergency permits and endorsements for specific subjects, programs, or positions. 3. Experience. 4. Recommendations and references. 5. Evaluations. 6. Suitability for the position and professional competence. 7. The needs of the District. 8. The Board prefers that all classified personnel who occupy positions requiring contact with school children, other District personnel, and the public as a whole, be bilingual (English/Spanish). 9. The Board prefers that all employees have a minimum of a GED or high school diploma.
DBB (Local) Employment Requirements and Restrictions: Medical Examinations and Communicable Diseases	TB TESTING REQUIREMENTS A tuberculosis examination shall be required of all new personnel at the start of employment and of all other personnel annually. A negative test result must be submitted to the personnel office prior to the employee's first workday. The examination must not be dated more than 120 days prior to the first workday. Employees who choose to have chest x-rays shall be required to present a negative test result every two years. Employees who do not submit a negative test result prior to the first workday shall not be allowed to report to work and shall be docked for each day they are absent.
DC(LEGAL) Employment Practices	The Board shall establish a policy designating specific positions of employment, or categories of positions based on considerations such as length of service, to which continuing contracts or term contracts apply.
DC(LOCAL) Employment Practices:	The Board retains final authority for employment and dismissal, based on the Superintendent's

Non-Contractual	recommendations, of noncontractual personnel whose positions are on the Special Assignment/Administrative Salary Schedule.
DC(LOCAL) Employment Practices: Applications	All applicants for employment must complete an application furnished by the District. Applications shall be in writing and on forms provided by the personnel services office. The application shall be designed to elicit all pertinent information about the applicant. The following information should be included: 1. A complete statement of all employment during the preceding five years, including specific dates for each position. 2. Sufficient references to provide a clear assessment of the professional and personal qualifications of the applicant. 3. The question "Have you ever been convicted of or pled guilty to a felony?" shall be answered by all applicants. It shall be the responsibility of the applicant to furnish accurate information, and any falsification of either information or credentials shall be cause for dismissal or refusal to employ. Information contained in applications shall be verified before a contract is issued. Information contained in applications for noncontractual positions shall be verified as soon as possible, but in any event not later than the end of the probationary period.
DC(LOCAL) Employment Practices: Criminal History Record	The District shall obtain criminal history record information on a person the District intends to employ.

Source: BISD Board Policy.

The purpose of hiring policies and procedures is to ensure that the district is fairly and legally hiring and compensating employees. The system is designed to have several checks and balances. Human Resources is charged with ensuring that candidates meet all the requirements of the job description and verifying that information submitted on applications is accurate. The area superintendent of Human Resources is responsible for confirming that procedures are followed and paperwork is completed for each new hire. The board is charged with approving salaries to ensure that taxpayer dollars are spent appropriately and within budget constraints.

When the system is circumvented, these safeguards cannot work and the district is exposed to the types of complaints and litigation it was designed to prevent.

Recommendation 28:

Establish checks and balances to ensure that everyone follows board-approved hiring practices.

Human Resources Department employees should be retrained in district hiring procedures to ensure that they understand the importance of the process and their role in it. The area superintendent of Human Resources job evaluation should include a section regarding the department's adherence to hiring practices and the area superintendent may want to alter the job descriptions of department employees assigned hiring process duties to hold those positions responsible for deviations of hiring policies.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The area superintendent for Human Resources and Human Resources administrators train all department staff on hiring procedures and practices.	March 2003
2.	The area superintendent of Human Resources modifies the area superintendent position's job evaluation to include a section regarding adherence to hiring practices.	March 2003
3.	The area superintendent of Human Resources submits the modified job evaluation to the superintendent for approval.	March 2003
4.	The superintendent approves the modified job evaluation.	March 2003
5.	The area superintendent of Human Resources randomly reviews recently hired employee paperwork during the summer hiring rush.	June-August 2003
6.	The superintendent uses audit reports and other indicators to evaluate the area superintendent of Human Resources regarding adherence to hiring practices.	Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

Employment reference checks are not routinely performed for non-teaching positions. The Certified Personnel Administrator said that she calls references on all new teachers. Local district policy states "The district shall obtain criminal history record information on a person the district intends to employ." This policy would include both teaching and non-teaching positions. Criminal history checks are generally performed for all personnel; however, the August 2002 Internal Audit Department's special report on hiring practices cites several instances where reference and/or criminal background checks did not occur.

Reference checks are important for all employees. Assuming the best indicator of future performance is past performance, reference checks can provide valuable information on the applicant's potential success. The supervisor responsible for choosing the candidate, or hiring supervisor, is in the best position to know what attributes will make candidates successful.

Another reason reference checks are important is the rise in negligent hiring/retention litigation. Negligent hiring is defined as the hiring of an employee who the employer knew or should have known, based on the employee's background, posed a risk to others in the workplace. Negligent retention is the retention of employees who engage in misconduct (wrongful acts) both during and after working hours. For example, a company that retains or hires an employee who has a history of physical abuse of coworkers may be found liable for not providing a safe work environment. Performing and documenting reference checks reduce an employer's exposure to negligent hiring/retention litigation.

Many types of district employees have contact with children, sometimes unsupervised by professional employees. Examples would include bus drivers and, occasionally, custodians. A personal and work reference check, on all district employees is important because it limits the district's liability and, most importantly, serves to protect the students. Furthermore, it is common for districts to establish reference check procedures and train supervisors on those procedures to ensure consistency in completing forms and conducting the actual reference checks.

Recommendation 29:

Implement procedures to ensure that reference checks are conducted on all new employees.

The hiring supervisor, or person making the candidate choice, should ideally perform reference checks. Current reference check forms should be used and kept in their personnel file. Principals should be provided the results of the reference checks for teachers coming to their campus.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Certified and Classified Personnel administrators create new hire procedures on how to conduct reference checks and complete the reference check forms.	March 2003
2.	The Certified and Classified Personnel administrators conduct training classes for all hiring supervisors.	April 2003
3.	The area superintendent of Human Resources instructs all hiring supervisors to complete reference checks before employees are recommended to him or the board.	April 2003
4.	The Certified and Classified Personnel administrators establish procedures that require reference check forms to be attached to hiring documents before approving new employees.	April 2003

FISCAL IMPACT

Since the training will be provided internally, this recommendation can be implemented with existing resources.

Chapter 3
HUMAN RESOURCES MANAGEMENT

D. STAFF DEVELOPMENT AND EMPLOYEE MANAGEMENT

One of the district's most valuable resources is its employees. In order to be successful the district must effectively manage this resource. A well-managed district can attract and retain the "cream of the crop". Polices and procedures, employee programs and staff development are all key areas of employee management.

TEC 11.253 and 21.451 directs districts to budget adequate time and financial resources to support a comprehensive staff development program that is guided by district and campus improvement plan. Districts must identify training needs for teachers and administrators, and when appropriate, involve teachers in identifying needs, planning and implementing training.

A district's staff development program for teachers and administrators must plan for and promote student achievement for all students focusing on standards for student performance in the Texas Essential Knowledge and Skills (TEKS). Staff development includes training in technology, conflict resolution, discipline strategies, district discipline policies and the code of student conduct. The staff development program promotes learning and collaboration with colleagues and reflects instructional best practices.

TEC 21.451 states that staff development is to be predominantly campus-based, related to achieving campus performance objectives and developed and approved by a campus-based committee. Activities may include: providing staff the opportunity to plan together to enhance existing skills; sharing effective strategies; reflecting on curricular and instructional issues; analyzing student achievement results; reflecting on means of increasing student achievement; studying research; practicing new methods; identifying students' strengths and needs; developing meaningful programs for students; appropriately implementing site-based decision making; and conducting action research. Staff development activities may include study teams, individual research, peer coaching, workshops, seminars and conferences. The district may also use district-wide staff development that has been approved through the district-level decision process.

FINDING

BISD has a comprehensive new teacher orientation program. The two-day in-service program is offered at the beginning of the school year and has group and individual sessions. The group sessions for the 2002-03 in-service introduced the teachers to the interim superintendent and the board president as well as other district administrators. Each day had a general session and luncheon with five breakout sessions. **Exhibit 3-25** shows the topics covered in the breakout sessions.

Exhibit 3-25
New Teacher In-service
Breakout Session Topics 2002-03

Day 1	Day 2
Professional Development and Appraisal System (PDAS)	Bilingual Education Overview (all participants)
Sexual Harassment in the Workplace	Special Education Issues (all participants)
Risk Management/Safety Information	Classroom Management
Site-Based Decision-Making (SBDM) overview and Certification Issues	Content Area presentations
Discipline Management	
Family Medical Leave Act/Americans with Disabilities Act	

Source: New Teachers In-service 2002-03 binder.

The program introduces new teachers to members of the organization, provides training on employee expectations, delivers valuable information, allows new teachers to meet colleagues and provides additional training in the teachers' content areas.

COMMENDATION

BISD provides a comprehensive and effective new teacher orientation program.

FINDING

The district effectively coordinates staff development for all employees. Staff development is completed on a department/campus level as well as the district level. The Staff Development Administrator is responsible for ensuring that the staff development provided is consistent with district priorities and is effectively addressing the true training needs of staff.

Staff development guidelines are board approved and distributed districtwide to all employees. Teachers are required to take a minimum of 18 hours of professional development training per year. Other job classifications also have minimum requirements. The department has an Electronic Registrar Online (ERO) System. This system is available 24 hours a day, seven days a week; anywhere a computer with Internet access is available. In addition, the system is also accessible via the telephone. The system keeps track of all professional activities the employee attends. Instructional materials on how to use the ERO System are readily available to employees. There are also three-hour classes available for training on the ERO System.

Specific staff development days are organized by the Professional Development Department each school year. Each day has numerous classes geared to every type of employee, including teachers, paraprofessionals and classified employees. Employees are required to sign up for the classes via the ERO system prior to the staff development day in order to attend. Outside of staff development days there are calendars of available classes for each month. All classes must be approved by the appropriate supervisor or principal. Several blocks of in-service training are available prior to the new school year to administrators, principals and new teachers. Employees must sign in and out of any class they attend. If they sign out early they will not get full credit for the class.

Principals and supervisors can view status within the ERO System by campus, department, person or program. Training reports can also be requested. In April of each year, the Professional Development Department sends out reports to each principal and department head with a reminder to submit any information that is lacking in the ERO System. This might include documentation on classes that were not scheduled through the ERO System. Examples might be class through Region I or through professional associations. Some training classes offer a stipend payment or numbers of CPE hours earned. In this case, an employee can file the request for the stipend payment directly through the ERO System.

The Professional Development department sends out evaluation forms to each participant in a class. Some of these forms are generic and others are customized based on the class. Generally the Professional Development department only has evaluations from programs that were offered district-wide, while campuses maintain evaluations for classes only held in their school. Some evaluation methods are based on direct learning and reinforcement. For example, after a teacher takes a class, a period of time is given to use what was learned. Then the evaluation may include observation as well as written tests.

The Professional Development Department also provides booklets containing Region I training, or information on where any local university training is available. The department has partnerships with local colleges and universities and has several grants that provide tuition assistance or books for a bachelor's or master's program.

Exhibit 3-26 presents a sample list of the course offerings during a January 8, 2002 staff development day.

Exhibit 3-26
Staff Development Day - January 8, 2002
Professional Development Department

Name of Workshop	Target Audience	Site
Language Development	All Pre-K Paraprofessional	Champion Elementary
Librarians in-service - Follett Software	Elementary Librarians/Library clerks	Gonzalez Elementary Library
3rd-Grade Science Content Training	3rd Grade Teachers	Gallegos Elementary
Socratic Questioning and Grammar Workshop	English IV Teachers	Besteiro Middle School
Sexual Harassment and Family Violence	Hall Monitors	Brownsville Police Dept.
Integrating Content and Skills Instruction	HS Social Studies Teachers	Porter HS Library, A151 B Hall Classrooms
Conducting Preliminary Investigations	Assistant Principals	BISD Boardroom
Dealing with Difficult People - Customer Service	Campus Principals' Secretaries	Pace HS, Room A 151
Review Transportation Issues	Transportation Employees	Transportation Dept.

Source: Staff Development Opportunities Calendar, January 8, 2002.

COMMENDATION

The Professional Development Department provides guidelines and comprehensive staff development to district employees.

FINDING

BISD does not have a formal Employee Assistance Program (EAP). An EAP is designed to provide confidential and voluntary assistance to all employees, including their relatives, who may be faced with financial concerns, legal issues, alcohol or drug problems, marital problems, illness of a family member, emotional worries, or child care problems.

The district currently has a school counselor who is assigned part-time as a counselor for all BISD staff. Employees are either self-referred or referred by supervisors. The most common areas addressed are stress, depression, family problems, and alcohol or drug abuse. Referrals to community agencies and programs, and to local therapists, counselors, psychiatrists, and psychologists are made as needed. The counselor also presents programs on stress management, depression, and alcohol and drug abuse as requested by various departments or schools. The counselor said that approximately 75 individuals are seen annually with approximately 230 counseling sessions offered.

According to a 2001 survey conducted by the Society for Human Resource Management (SHRM), 91 percent of companies with more than 5,000 employees have EAPs. The survey also noted that an average of four to eight percent of eligible employees used this service in the late 1990s. For BISD, the relative figure would fall somewhere between 262 and 524 employees each year.

It can cost an employer when an employee is dealing with unmanageable stress or is privately managing a mental health condition such as depression. The employee:

- Almost never discloses the condition; only seeks constructive support after it has impacted performance or the work environment; or admits the seriousness of it just when it has reached a crisis point;
- Is less likely to seek appropriate care for stress or depression-related symptoms than a physical injury;
- Will most likely have a longer disability claim period due to an occupational injury than an employee without a mental health condition; and
- Is most likely not to return to work when disability is managed passively.

Unlike an employee who is physically injured and returns to work only when medically able, the worker with a stress or mental health-related condition brings this diminished status to work everyday.

EAPs have demonstrated the ability to improve employee productivity, reduce healthcare costs, improve employee retention, and lower the

number of accidents caused by employees with serious psychiatric and substance abuse problems.

Recommendation 30:

Create a position for a full-time Employee Assistance Program coordinator.

The district's use of a part-time school counselor to address employee issues is insufficient because the counselor is unable to serve all district staff. The program could be improved and expanded by dedicating a full-time counselor to Employee Assistance and Wellness programs.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The area superintendent of Human Resources and the Risk manger create a job description for an Employee Assistance Program coordinator.	March 2003
2.	The area superintendent of Human Resources presents the job description to the superintendent and the board for approval.	April 2003
3.	The superintendent and the board approve the new position.	April 2003
4.	The area superintendent posts the vacancy and conducts interviews.	May 2003
5.	The area superintendent of Human Resources presents the selected candidate to the superintendent and the board for approval.	June 2003
6.	The superintendent and the board approve the hire.	August 2003

FISCAL IMPACT

This will result in an annual cost of $71,694 ([$60,903 x 1.12 variable benefits] + $3,483 fixed benefits = $71,694). This is calculated by using the midpoint salary of the current coordinator for Wellness Programs.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Create a position for a full-time Employee Assistance Program coordinator.	($71,694)	($71,694)	($71,694)	($71,694)	($71,694)

Chapter 4
COMMUNITY INVOLVEMENT

This chapter reviews Brownsville Independent School District's (BISD) community involvement in the following sections:

A. Organization and Management
B. Partnerships
C. Communications/Public Relations
D. Parental Involvement

Community involvement is an integral part of the successful operation of a school district. An effective community involvement program requires that a school district establish mutually beneficial relationships with community members, parents, civic and faith-based organizations and business leaders. By encouraging the participation of each of these groups, the district is able to put their collaborative efforts towards a positive educational experience for each student.

In addition to communicating with outside stakeholders, the district must communicate internally so that employees are aware of their rights and responsibilities according to the formal and informal policies, procedures and relationships that govern the environment in which they work.

BACKGROUND

Several factors affect the size and effectiveness of a community involvement program. These factors include the size of the district, the number of businesses in the area, the income level of the parents and other community members and the amount of money and number of staff members the district can afford to allocate toward a community involvement program. Because these factors vary in school districts across the state of Texas, there is variation among the community involvement programs.

Some of the conditions that surround BISD and have an effect on the district's community involvement efforts are:

- The city of Brownsville has a low per capita income, with more than half of households earning less than $25,000 per year. This presents a challenge in that it is difficult for parents to volunteer during school hours since doing so could result in missing work and forfeiting wages.
- Over 30 percent of Brownsville's population is foreign-born and an estimated 90 percent of those over age five speak a language other

than English, namely Spanish. Approximately 90 percent of Brownsville's population is of Hispanic descent, and nearly 90 percent of the population over age five speak Spanish. Forty-two percent of residents report that they speak English "less than very well."

- The district has a large percentage of economically disadvantaged students, which makes the district eligible for a large Title I, Part A entitlement used to fund a Parental Involvement program.
- Brownsville's proximity to the U.S./Mexico BORDER=1 leads to a high number of non-documented immigrant children in the district. Classroom volunteers are required to go through a screening process that includes proof of social security registration. Because many of the parents of these children do not have a social security card, they are unable to receive clearance to volunteer in the classroom, or they understand that having a social security card is a requirement and avoid the process altogether.

These conditions have presented the district with unique challenges and opportunities that have shaped the way the community and parental involvement programs operate today. While there are areas that can be improved in order to fine-tune the overall process, there are also areas that bear recognition for commendable performance.

Chapter 4
COMMUNITY INVOLVEMENT

A. ORGANIZATION AND MANAGEMENT

Two divisions are responsible for BISD's community involvement function. The Public Information Office is the district's central office for establishing collaborative partnerships between the district and the community, as well as producing and distributing internal and external communications. The department of Parental Involvement within the Federal Programs Office is responsible for increasing parental involvement in the district and its 50 schools through the establishment of a Parental Involvement program funded by Title I, Part A grant money.

A Public Information officer, who reports directly to the interim superintendent, heads the Public Information Office at BISD. The responsibilities of the Public Information officer include, but are not limited to, overseeing the operation of the Public Information Office, maintaining a positive relationship between the district and the community, corresponding with local media, serving as the district's spokesperson, writing articles for district publications and coordinating and implementing programs to involve the community in the district.

A secretary reports directly to the Public Information officer. The secretary is primarily responsible for providing and keeping records, handling inquiries and open records requests, preparing correspondence and other writing tasks and performing special assignments as required by the Public Information officer. The secretary also oversees three additional personnel: the graphic layout artist, a receptionist and a clerical assistant.

The graphic layout artist is responsible for creating and designing graphic materials using a computer, related software packages, a scanner and other peripheral equipment in order to produce informational and promotional materials. The receptionist is in charge of supervising and operating the district's switchboard, connecting callers with the appropriate department in an accurate, friendly and timely manner. The clerical assistant is responsible for assisting the receptionist with answering calls, performing deliveries to local media and district departments, photographing district events, assisting with the production and distribution of district publications and performing other related tasks as required.

Ten building custodians also report to the Public Information Office. The custodians work throughout the administration building but report to the Public Information Office and are paid out of the Public Information Office's budget.

Exhibit 4-1 presents the organization of the Public Information Office.

Exhibit 4-1
Organization of Public Information Office
2002-03
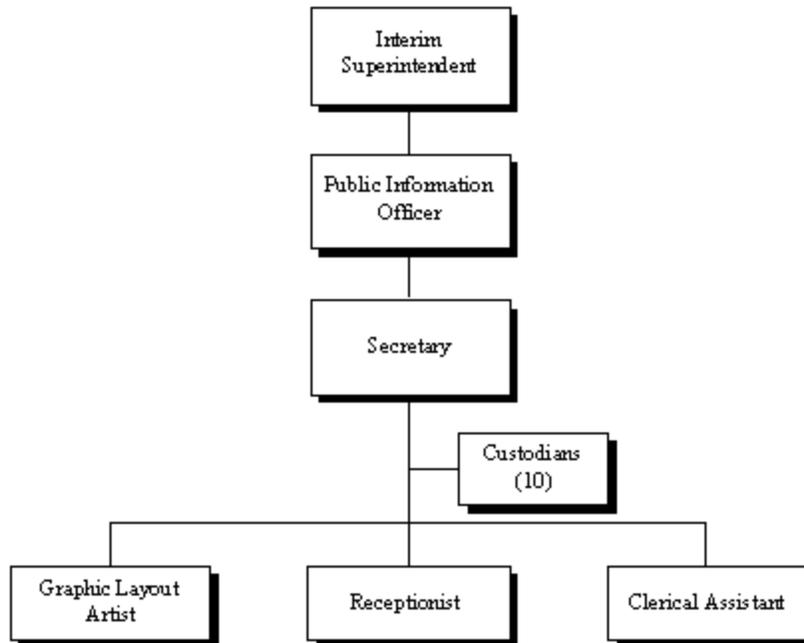
Source: BISD Public Information Office, 2002.

The Public Information Officeoperates under a $440,745 budget during the 2002-03 school year. **Exhibit 4-2** shows the main budget categories along with their respective dollar amounts for the 2002-03 school year.

Exhibit 4-2
Public Information Office
Budgeted Expenditures
2002-03

Category	Amount
Payroll	$285,960
Professional/Contract Service	$103,185
Supplies/Materials	$23,800
Other Operating Costs	$10,500
Land/Building/Equipment	$5,000
Plant Maintenance/Operations	$12,300

Total	$440,745

The payroll amount includes the secretary, receptionist, graphic layout artist, clerical assistant and custodians. The Public Information officer's salary was paid out of Classified Personnel's budget during 2002-03.

The professional and contracted services amount represents printing costs, costs associated with distributing newsletters and other contracts the department has with outside vendors. The other operating costs include employee travel, dues paid to the Texas State Public Relations Association, awards for the Texas Public Schools week during which schools with high levels of volunteerism are awarded and other such expenses.

The Federal Programs administrator is the head of the Federal Programs Office in charge of overseeing the Migrant Education and Parental Involvement programs at BISD. The Parental Involvement program, also referred to as the department of Parental Involvement, is staffed with a clerical assistant, eight parent trainers and 50 parent liaisons. Each school in the district has a parent center staffed by a full-time parent liaison. The schools are divided into clusters based on the size of the school. The parent trainers are responsible for one of the clusters and oversee the parent centers and parent liaisons at each of the schools in their cluster. **Exhibit 4-3** depicts the organization of the department of Parental Involvement.

Exhibit 4-3
Organization of Department of Parental Involvement

2002-03

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                    ┌─────────────────────┐
                    │  Special Programs   │
                    │    Administrator    │
                    └─────────────────────┘
                               │
                    ┌─────────────────────┐
                    │  Federal Programs   │
                    │    Administrator    │
                    └─────────────────────┘
                               │
                    ┌─────────────────────┐
                    │ Coordinator for     │
                    │ Parental Involvement│
                    │     (vacancy)       │
                    └─────────────────────┘
                               │
          ┌────────────────────┴────────────────────┐
   ┌────────────────┐                        ┌────────────────┐
   │Clerical Assistant│                       │Parent Trainers (8)│
   └────────────────┘                        └────────────────┘
                                                      │
                                              ┌────────────────┐
                                              │Parent Liaisons (50)│
                                              └────────────────┘
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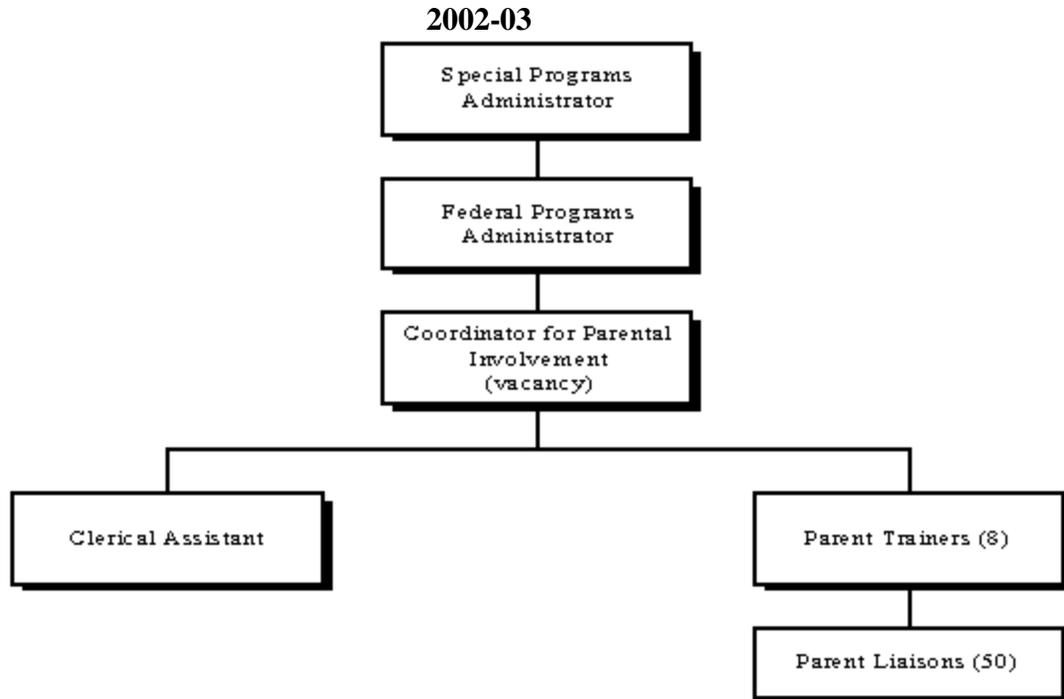
Source: BISD Federal Programs Office, September 2002.

The district budgeted $873,199 during the 2001-02 school year for parental involvement. **Exhibit 4-4** shows the main budget categories along with their respective dollar amounts for the 2001-02 school year.

Exhibit 4-4
Parental Involvement
Budget Expenditures
2001-02

Category	Local	Title I	Total
Payroll	$68,413	$595,465	$663,878
Professional/Contract Service	$12,575	$12,580	$25,155
Supplies/Materials	$30,290	$40,914	$71,204
Other Operating Costs	$6,835	$87,343	$94,178
Land/Building/Equipment	$8,000	$10,784	$18,784
Total	**$126,113**	**$747,086**	**$873,199**

Source: BISD Official Budget, 2001-02.

The payroll costs in the local fund represent half of the Parental Involvement coordinator's salary and three of the employees in the Adult Education office: two part time employees and one full time clerk. Title I funds the parent liaisons, parent trainers and the other half of the Parental Involvement coordinator's salary.

The professional and contracted services that are not covered by Title I funds come out of the local funds. These include guest speakers and training for parental involvement employees. Likewise, the supplies and materials that are not able to be purchased with Title I money, according to the Office of Management and Budget (OMB) Circular A-87, comes out of the local fund. Circular A-87 establishes principles and standards for determining costs for federal awards carried out through grants, cost reimbursement contracts and other agreements with state and local governments in order to promote effective program delivery, efficiency and better relationships between governmental units and the Federal Government. The principles are for determining allowable costs only. If the item cannot be purchased with Title I funds according to OMB A-87, the district purchases the item with local funds. Other operating costs include things like travel for parental involvement staff and food for parental involvement activities. These purchases are also dictated by OMB A-87 and, therefore, come out of local and Title I funds depending on the item being purchased.

The land, building and equipment category mainly funds the purchase of computer equipment for the parent centers, but can also include such things as refrigerators for the parent centers. In 2002, TEA approved the district to receive $1.9 million for the purchase of portables to be used to house the parent centers at each school beginning in 2003-04. The purchase of the portables is pending approval by the school board.

In the 2002-03 District Improvement Plan (DIP), Parents and Community is one of nine areas for which goals were developed for improvement. The 2002-03 District Education Improvement Committee (DEIC) consisted of one staff member from each school, two parents, two community members and two business representatives. The responsibilities of the DEIC include developing, monitoring and evaluating the DIP and reviewing the Strategic Action Plan (SAP) to ensure that all activities are aligned to the goals and objectives of the DIP. **Exhibit 4-5** details the parental and community involvement goals and objectives along with the action steps outlined to accomplish these goals.

Exhibit 4-5
BISD District Improvement Plan
2002-03

AREA: Parents and Community	
GOAL: Parents will be full partners with educators in the education of their children.	
OBJECTIVE: There will be a 10 percent increase of parents involved in campus/district parental involvement activities during the school year.	
Action Step	**Timeline**
Survey all BISD schools with regards to the effective parental involvement activities being implemented; focus should be on how parents can positively affect TAAS scores, improve attendance rates, and reduce dropout rate.	September 2002 to January 2003
Establish a District Parental Involvement Standard for all campuses; this should include processes for recognition and support.	January 2003 to March 2003
Survey parents to evaluate the level of parental involvement throughout the district.	January 2003 to March 2003
Principals shall ensure that Federal Funds are appropriately allocated to ensure campus Parent Centers operate efficiently.	September 2002 through May 2003
Institute a parental involvement component of staff development during at least one faculty meeting for BISD employees that focuses on how to foster positive parental and community relationships	August 2002 May 2003
Parental Involvement trainers will schedule monthly trainings for parents to address topics like: adolescent behavior, conflict resolution, test taking skills, etc.	August 2002 May 2003 Monthly
Provide regularly scheduled opportunities to have principals and/or teachers communicatewith families via conferences, e-mail, newsletters and voice mail messages.	August 2002 May 2003 Monthly
District employees shall document involvement with parents via telephone calls, conferences at school, PTA meetings, Open House activities and extra-curricular activities at school.	August 2002 May 2003 Monthly
Host a campus parent/teacher report card meeting at each campus (once per semester).	Texas Public School Week, 1st Public School Week
Recognize schools that make significant progress in increasing the level and quality of parent involvement at their sites.	Fall and Spring Conferences
Establish a districtwide Parental/Community Involvement	2nd Week of

Week during November with activities for parents.	November 2002
Provide e-mail account access to all campus employees; affording parents an opportunity to communicate with their child's Teacher, Counselor, Nurse, Dean/Facilitator, Administrator, etc.	August May 2002-03
The parental involvement offices will publish/advertise all districtwide opportunities for Parental/Community Involvement on a monthly basis.	Monthly 2002-2003
The Department of Parental Involvement will provide district support to campuses as they develop publications and/or other media communications with parents.	August May 2002-03
Expand the District (Title I) Fall and Spring Parent Conferences to promote two-way communication to a cross section of the population.	Fall and Spring Conferences
BISD Board of Trustees will conduct three public town meetings with the community to discus perceptions and recommendations on how the district and the community can work together in the pursuit of student achievement.	September 2002- May 2003
Continue and expand the Adopt-a-School program.	September 2002- May 2003
Inform parents and students of financial aid opportunities at BISD Financial Aid Night.	Spring 2003
Create community service opportunities for staff and students, including class projects at every grade level, academic teams and campus organizations.	September 2002- May 2003
Recognize district staff and students for community service.	September 2002- May 2003
Host District Career Awareness Days for elementary, middle, and high school students at designated grade levels; utilize expertise from the private sector and community leaders.	October 2002- January 2003

Source: BISD, District Improvement Plan, 2002-03.

FINDING

The Public Information Office does not solicit input from parents and community members to assess the department's performance. The Public Information Office disseminates information to the community via

articles, media and coordinating programs that involve the community. Without gaining input from the community-at-large, the department has no way of knowing which programs, publications and communication vehicles are the most effective and what improvements could be made to enhance the programs and publications.

The Community Relations Department at Fort Bend ISD (FBISD) conducts a parent survey that covers community relations and communications issues. The survey is mailed every other year. The last survey was distributed in 2001 to a stratified, random sample of 12,000 parents. More than 1,400 parents responded to the survey. The survey is an excellent tool for obtaining feedback from the parents. Executive summaries of the survey responses are distributed to administrative department heads and school administrators for use in identifying areas for improvement.

Recommendation 31:

Use a survey as a means of allowing the district's parents and community members to provide input on the performance of the Public Information Office.

The survey will allow the Public Information Office to be more open to comments and suggestions from the BISD community. This will send a positive message to members of the community and will also allow the Public Information Office to make improvements to its operations in order to better serve the community.

By conducting the survey on a biennial basis instead of annually, the district may dedicate a concerted effort to more effectively analyzing, planning, and communicating survey outcomes in a manner that will bolster community confidence in the district's public outreach strategy.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent directs the Public Information officer to conduct parent and community member surveys to determine their satisfaction with the Public Information Office.	April 2003
2.	The Public Information officer designs the surveys and submits them to the superintendent for review and approval.	May 2003
3.	The Public Information officer distributes the surveys to a random sample of parents and community members.	September 2003 and Biennially Thereafter

4.	The Public Information officer tabulates survey results and prepares a survey report.	October 2003 and Biennially Thereafter
5.	The Public Information officer provides a copy of the report to the superintendent and board.	November 2003 and Biennially Thereafter
6.	The Public Information officer publicizes the survey results to parents and the community.	November 2003 and Biennially Thereafter
7.	The Public Information officer uses survey results in updating departmental plans, publications and programs.	October 2003 and Ongoing

FISCAL IMPACT

The survey should be sent at the end of each school year, biennially, to randomly selected parents and randomly selected community members. Costs to the Public Information office will consist of producing the surveys and supplying envelopes and postage for survey return.

The survey should include parents and community members and use a double-sided one-page questionnaire with the front in English and the reverse in Spanish. The total cost of producing the survey is estimated to be $30 (600 pages x $0.05). The district will need 1,200 envelopes to mail the survey, including return envelopes to parents and community members. Envelopes will cost an estimated $120 (1,200 x $0.10). Postage for the surveys will total $888, which includes the cost of mailing the survey and the cost of return postage (1,200 surveys and return postage envelopes x $0.37). The total cost for the surveys will be $1,038 per year ($30 + 1,200 + $888).

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Use a survey as a means of allowing the district's parents and community members to provide input on the performance of the Public Information Office.	($1,038)	($1,038)	($1,038)	($1,038)	($1,038)

Chapter 4
COMMUNITY INVOLVEMENT

B. PARTNERSHIPS

The Public Information Officeestablished an Adopt-a-School program in 1993. The program pairs local businesses and organizations with one or more of BISD's schools so that they may contribute monetary and/or in-kind contributions. The Adopt-a-School program is the only formal program used by the district to solicit contributions from community businesses and organizations.

Some of the businesses and organizations that currently participate in the Adopt-a-School program are:

- U.S. BORDER=1 Patrol
- Church's Chicken
- Golden Corral Restaurant
- H-E-B Food Stores
- International Bank of Commerce
- Linda's Cake Specialty Shop
- Luke Fruia Motors
- Peter Piper Pizza
- Pizza Hut
- Target
- Wal-Mart
- Whataburger

In addition to the Adopt-a-School program, the district establishes collaborative partnerships with organizations in the community to provide services to the students and staff of BISD at a low annual cost to the district.

FINDING

The Public Information Office has established collaborative partnerships with organizations in the community which has resulted in benefits to the students and staff of BISD. The five organizations that have established partnerships with the district are the Gladys Porter Zoo, the Historic Brownsville Museum, the Brownsville Historical Association, the Brownsville Barnstormers Flying Museum and the Brownsville Art League. School personnel are encouraged to use the services provided by the partnerships, including free or reduced admission, guided tours, use of facilities and access to educational materials. School personnel are

informed of the benefits provided through a brochure produced by the Public Information Office each year.

The district and the partnering organization sign a contractual agreement, under which the services provided are agreed to and paid for by the district. The contract amount is paid through local maintenance funds with a total amount of $115,000 annually. Each of the partners, along with the cost to the district and details of their agreement, are listed in **Exhibit 4-6**.

Exhibit 4-6
Collaborative Service Agreements
2002

Organization	Contract Amount	Agreement Details
The Gladys Porter Zoo	$56,000	• One discounted admission ticket for each BISD student • Staff development activities to assist faculty and staff members via three teacher workshops conducted during the school year. • Educational slide and video presentations for any BISD school group. • Educational television and other media programming providing educational material and facts. • District use of the Zoo's Education Complex, Amphitheater, and Special Events Building.
The Historic Brownsville Museum	$41,000	• Admission fees for all students and employees. • Staff development activities, which allow faculty and staff members to take full advantage of museum services. • Field trip activities for students and faculty to local battlefields, the city cemetery and other local sites of historical significance. • District use of any and all physical facilities of the museum. • Preparation of a unit of instruction relating to local history. • Resource specialists for faculty and

		• student researchers. • Class tours of museum facilities.
The Brownsville Historical Association	$6,000	• Admission fees for all district students and their sponsors on school sponsored field trips to the Stillman House Museum. • Staff development activities through the Heritage Resource Center. • Films and other educational media materials for teacher use.
The Brownsville Barnstormers Flying Museum	$6,000	• Admission fees for all students and employees. • Films and other media educational materials for teacher use. • Preparation of a unit of instruction relating to local aviation history. • Resource specialists for faculty and student researchers. • Class tours of the Flying Museum facilities. • Assisting the BISD Instructional Television Department in the production of historical and/or aviation programs and/or make available local Air Show videos.
The Brownsville Art League	$6,000	• Admission fees for all students and their sponsors. • Staff development activities to help employees take advantage of Brownsville Art League services. • District use of any and all physical facilities of the Brownsville Art League for meetings and exhibits. • Films and other educational materials.
Total	**$115,000**	

Source: Collaborative Partnerships Brochure, Public Information Office, 2002.

The contract fees paid to the partners come out of a districtwide local initiative account, as opposed to the Public Information Office's budget. The Public Information officer ensures the district is getting the full benefit of the partnerships by requesting counts of, for example, the number of zoo tickets redeemed by students as a result of the partnership and the number of times facilities were used for district meetings and/or events.

COMMENDATION

The Public Information Office has established partnerships with organizations in the BISD community to provide benefits to staff and students districtwide.

FINDING

The district's Adopt-a-School program is not centrally coordinated, which results in a fragmented approach to soliciting monetary and in-kind contributions from businesses and organizations in the Brownsville community.

Each year, the Public Information Officeprints an Adopt-a-School brochure and sends multiple copies of the brochure to each school in the district. The brochure describes the Adopt-a-School program; lists some of the businesses that participate in the program; gives examples of how a business or organization can contribute and lists the names, addresses and phone numbers of each school in the district. The back of the brochure advises a business or organization that is interested in becoming an Adopt-a-School partner to contact any school administrator or the BISD Public Information officer. Each school is responsible for soliciting partnerships for their school by approaching businesses for contributions and/or sending them a copy of the brochure and allowing them to respond.

If a business or organization is interested in participating in the program, they are asked to sign a one-year agreement with the school they choose to adopt. The agreement details the goals and objectives of both the school and the business or organization involved in the partnership and also lists the mutually beneficial activities planned for the year. The agreement also lists the activities planned for the year.

Although all of BISD's schools with the exception of the Alternative Education Center, Lincoln Park, the Teen Learning Community and the Regional School for the Deaf-- enjoy a partnership with a business or organization as a result of the Adopt-a-School program, the distribution of contributions is inequitable, in that some schools receive contributions from multiple businesses, while others receive contributions from only one

or two. For example, Clearwater Elementary receives contributions from 19 businesses and Perez Elementary has 16 business partners, while Martin Elementary and Paredes Elementary receive contributions from only one business partner.

Socorro ISD has a Partners in Education program designed to solicit contributions from community businesses and organizations in much the same way as BISD's Adopt-a-School program. Responsibility for the program is centralized at the office of Special Events and Partnerships and is overseen by the coordinator of Special Events and Partnerships. SISD has established numerous partnerships that benefit both its schools and the businesses.

Ysleta ISD also has a Partners in Education program. If a business expresses interest in becoming a partner, the Media Relations/Partners-in-Education department assesses its resources against school needs and matches the business with an appropriate school, which translates to more equitable distribution of contributions among schools in the Ysleta ISD. Partnerships are formalized through signed agreements outlining specific activities agreed to by each party.

Recommendation 32:

Assign responsibility for coordinating the Adopt-a-School program to the Public Information Office and develop a mechanism for tracking the monetary and in-kind contributions of each business partner in a manner that will more equitably distribute contributions to schools.

The Adopt-a-School brochure should be modified so that the telephone numbers for each school are removed from the brochure and the reader is advised to contact the Public Information Office if they are interested in becoming an Adopt-a-School partner.

The tracking mechanism will allow the Public Information Officeto be continuously aware of the contributions that are being enjoyed by each school in the district and will allow the department to conduct a needs assessment so that future contributions can be equitably allocated.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent directs the Public Information officer to take over responsibility for the Adopt-a-School program.	March 2003
2.	The Public Information officer and the graphic layout artist revise the Adopt-a-School brochure to remove school telephone numbers from the brochure and advise interested businesses and	April 2003

	organizations to contact the BISD Public Information Office.	
3.	The secretary for the Public Information Office develops a tracking spreadsheet with the name of the organization, the partnering school(s), the contract start date, the contract end date and a description of the contribution.	May 2003
4.	The Public Information officer collaborates with the Chamber of Commerce to develop a comprehensive mailing list of all businesses in the BISD area and sends a copy of the brochure to each of those businesses annually.	August 2003 Annually
5.	The receptionist for the Public Information Office updates the mailing list each year to ensure businesses and organizations that are new to the area are added and businesses and organizations that are no longer in the area are deleted.	Annually
6.	The Public Information officer serves as the contact person for interested businesses and organizations and the liaison between those partners and the respective district to which they will contribute.	Ongoing
7.	The secretary for the Public Information Office makes a copy of the Adopt-a-School agreement for the business partner, the school and the Public Information Office.	Ongoing

FISCAL IMPACT

According to a representative from the Brownsville Chamber of Commerce, there are approximately 970 businesses registered with the chamber. At $0.55 per copy, printing a copy of the Adopt-a-School brochure for each of these businesses would cost $534 ($0.55 x 970) each year. Mailing the brochures would cost $0.37 per brochure, for a total of $359 ($0.37 x 970). The total annual cost of producing and mailing the Adopt-a-School brochure would be $893 ($534 + 359).

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Assign responsibility for coordinating the Adopt-a-School program to the Public Information Office and develop a mechanism for tracking the monetary and in-kind contributions of each business partner in a manner that will more equitably distribute contributions to schools.	($893)	($893)	($893)	($893)	($893)

Chapter 4
COMMUNITY INVOLVEMENT

C. COMMUNICATIONS/PUBLIC RELATIONS

Communicating with members of the community, as well as district employees, is an important part of the community involvement function because it keeps the district's stakeholders informed of district events, news and other important information. A school district must use effective vehicles for communication that convey honest and timely information in order to maintain the trust and confidence of internal and external stakeholders.

FINDING

The Public Information Officeuses a variety of programs and publications to establish communication with internal and external audiences of the district. BISD's communications are directed to its employees, community leaders, area businesses, news media, parents, volunteers and the Brownsville community at large. The programs and publications that are currently used by the district are listed in **Exhibit 4-7**.

Exhibit 4-7
Programs and Publications 2002

Program/Publication	Description
Board Highlights	A summary of board meetings printed and distributed to campuses and departments the day after a regularly scheduled board meeting and after some of the special-called meetings.
Planning Calendar	Approximately 7,500 calendars are printed and distributed at the beginning of the school year with major events and activities planned for the year. The calendars are distributed to BISD employees during in-services.
Fax Listing, District Directory, Board of Trustees Listing and Administrator Listing	The Public Information Office updates the information contained in these items frequently throughout the year on an as-needed basis. The lists are distributed to all BISD employees.
News Review	A newsletter that contains a variety of articles and important dates. Approximately 5,000 copies are distributed five times per year to BISD

	employees. Another 62,000 newsletters are included in the *Brownsville Herald* and the *Bargain Book* for distribution five times per year to the BISD community.
Pocket calendars and poster calendars	A variation of the yearly calendar distributed to BISD employees and departments at the beginning of the school year.
Newstips	Each week, schools and departments use *Newstips* as a means of notifying the Public Information Office that they want publicity for a particular event or activity.
Health Fair and Blood Drives	The Public Information Office coordinates and sponsors a Health Fair for district employees each June in the BISD boardroom. In addition, Blood Drives are held periodically throughout the year.
United Way Campaign	The Public Information Office coordinates the scheduling of speakers and presentations for the yearly BISD United Way Campaign.
Bulletin Board	The Public Information Office maintains three bulletin boards, one on each floor of the administration building. The bulletin boards contain various bits of district information and are updated weekly.
Community presentations at principals' meetings	The Public Information Office schedules and introduces community presenters at the principals' meetings held twice a month.
Conference presentations at board meetings	The Public Information Office coordinates the recognition of students, district personnel and community members during the monthly board meetings.
Network	A media advisory is sent out once or twice a week, on an as-needed basis, to all Rio Grande Valley radio, television and newspaper entities.
Press Releases	Press releases are sent out when a significant event in the district requires more information than is found in the weekly network.
Advertisements	Newspaper ads appear on Sundays in the *Brownsville Herald*, both in English and Spanish, that inform the public of important district meetings, events and alerts. The ads also appear

	on Wednesdays in the *Bargain Book* in both English and Spanish.
Zoning Maps	The Public Information Office updates zoning maps of BISD on an as-needed basis and distributes them to schools and community members.
Education Extra	The Public Information Office supplies story ideas, information and photographs for the *Education Extra*, which is a weekly section in the *Brownsville Herald*.
Brochures	The Public Information Office produces various brochures each year on an as-needed basis.
Chamber of Commerce Newsletter and Publications	The Public Information Office submits items to the Chamber of Commerce to be included in their newsletter and publications on a monthly basis.
Summer School Guide	A catalog that lists summer school classes is distributed to all schools each April or May.
Student Handbook	The Public Information Office prints and distributes the student handbook each year. The handbooks are distributed to each student in the district.

Source: BISD Public Information Office, 2002.

The Public Information Office has received awards for several of its publications. Each year, the department enters 10 to 15 of its publications in the Texas School Public Relations Association (TSPRA) Star Awards contest, competing against school districts across the state. The graphic layout artist and the Public Information officer meet each year before the contest to decide which publications will be entered. In 2001, the district won the awards listed in **Exhibit 4-8**.

Exhibit 4-8
TSPRA Star Awards Received by BISD Public Information Office in 2001

Publication/Program	TSPRA Star Award Category	Award Received
Shaping Masterpieces One Student at a Time	Special Purpose Publications: Calendar/Planner	Silver Star
2001 BISD Employee Awards	Special Purpose Publications:	Silver Star

Night	Programs	
2001 Principle for a Day	Image/Identity: Image/Identity Packages	Gold Star
Making the Grade	Electronic Categories: Cable/Broadcast TV	Silver Star

Source: Texas School Public Relations Association Star Award Winners Pamphlet, 2001.

In addition to the TSPRA awards, the department was a Lone Star Award finalist in 2002 for participation and support of the 2001 United Way Campaign. The Lone Star Award ceremony is held each year by the Houston Press Club and allows entries from all Texas media.

Results from a TSPR survey reveal that a majority of the parents surveyed feel that the district regularly communicates with parents. Almost 20 percent strongly agreed and approximately 44 percent agreed. The results of the survey question are summarized in **Exhibit 4-9.**

Exhibit 4-9
Survey Responses
The district regularly communicates with parents.

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
The district regularly communicates with parents.	19.6%	44.2%	12.3%	16.7%	5.1%	1.8%

Source: TSPR Survey Results, September 2002.
Note: The review team distributed more than 3,900 surveys and received 1,223 completed surveys. While the surveys are not scientifically administered, they represent a random sampling of parents and other stakeholders.

COMMENDATION

The Public Information Office provides information externally and internally in a variety of ways and has received awards for several of its publications.

FINDING

The Public Information Office uses cable television and radio stations to transmit district information. The district has an instructional television station, KBSD, which runs a bulletin board every evening from 9:00 p.m. to 9:00 a.m. on weekdays. The bulletin board runs continuously on the weekends. If a department or school in the district wants to display information on the bulletin board, it forwards it to the Public Information Office, which in turn creates the announcements and forwards them to KBSD. Approximately 53 percent of households in the Brownsville community have cable television.

In addition to KBSD, the Public Information Office purchases several radio spots each month on KBOR, a Spanish radio station that exclusively serves Brownsville. The total cost of the radio spots is $750 per month for 65 spots at 30 seconds each.

According to TSPR survey results, a strong majority of district administrators, support staff and teachers agree that the local television and radio stations regularly report school news. The survey results are summarized in **Exhibit 4-10**.

Exhibit 4-10
Survey Responses
The local television and radio stations regularly report school news and menus

Group	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Administrators	9.5%	54.1%	18.2%	14.2%	2.0%	2.0%
Teachers	20.3%	66.5%	2.5%	7.0%	3.8%	0.0%

Source: TSPR Survey Results, September 2002.
Note: While these surveys are not scientifically administered, in a random sampling of 700 administrators and 550 teachers that were sent surveys, 148 administrators and 158 teachers responded. The results are included here to show the general opinion of those responding.

COMMENDATION

The Public Information Office uses cable television and radio stations to communicate district information.

FINDING

The Public Information Officehas developed a highly efficient and effective process for tracking open records requests. The secretary for the Public Information Office is in charge of documenting requests received. To organize these requests, the policy, procedures and information specialist in the department created a tracking spreadsheet that includes, but is not limited to, the date the request was made, by whom the request was made, the type of request, to which department or administrator the request was referred, a compliance due date, a checkbox for whether or not the request was in compliance with the 10 day time requirement and any fees associated with the request. There are also columns that allow the secretary to type when each of three reminders were sent to the person handling the request. The department sends a reminder to ensure the request is received 10 business days after the request was made. A spreadsheet containing this information is made for each month of the year. At the bottom of each monthly spreadsheet is a box that shows a summary of the total number of requests in compliance, the total number of requests pending clarification and the total fees received. On average, 75 to 100 requests are received each month, ranging from requests for videos of district sporting events to a particular employee's annual salary.

There is also a spreadsheet that compiles a year-to-date report. The report breaks up the months of the year in quarters beginning in January. Listed next to each month are the total number of requests pending clarification, the total number of requests, the total number of requests in compliance, as well as the total not in compliance, the number of requests mailed, the total number of mail payments received and the total dollar amount of fees/charges associated with the requests. A chart that graphically depicts the information is included beneath these columns. This report can be quickly and easily printed for anyone requesting such information.

The district's legal counsel becomes involved in the open records process if there is a question as to whether a request can or cannot be fulfilled. If a request cannot be fulfilled, the legal counsel sends a letter to the person making the request that clearly states why the district is not able to provide the requested information.

In addition to the tracking spreadsheet, the secretary in charge of open records requests created a binder with information pertaining to open records for reference by her predecessor or in the event that she is out of the office. Developing this reference binder is indicative of the high degree of importance the department places on fulfilling open records requests and a commitment to ensuring that requests continue to be a priority in the future. The binder contains a flow chart with request procedures, reference materials about the Public Information Act, a copy

of the request form used to notify the district administrator to whom the request is sent that information is being requested, as well as a copy of the instructions sent to that person detailing their responsibilities in fulfilling the request, guidelines for copy charges, instructions on what to tell the person requesting the information, including how many days the district has to fulfill the request and the costs associated with the request (videos, cassettes, diskettes, etc.) instructions on how to send reminders; and a list of frequently asked questions relating to the Public Information Act for quick reference.

COMMENDATION

The Public Information Office uses a highly efficient and effective process for tracking open records requests.

FINDING

The district does not print a Spanish version of its newsletter for the public. Approximately 90 percent of Brownsville's population is of Hispanic descent and nearly 90 percent of the population over the age of five speaks Spanish.

The district's newsletter, *News Review*, serves as an internal and external newsletter. The newsletter received a Silver Star Award from the Texas Public Relations Association in 2000. Approximately 5,000 copies are distributed internally via district mail, while the external copies are distributed as inserts in the *Brownsville Herald* and the *Bargain Book*. The *Bargain Book* and the *Brownsville Herald* are both Spanish and English publications. The *Bargain Book* is distributed to the community door-to-door everyday.

The Sunday edition of the *Brownsville Herald* is used as the distribution day for *News Review* because it is the day of the week with the highest sales volume. *News Review* is distributed in the *Bargain Book* on Wednesdays, which is the only day of the week the newspaper is distributed. Approximately 62,000 copies are distributed in both newspapers five times per year for a total of 310,000. The cost to distribute the newsletter through the *Brownsville Herald* and the *Bargain Book* is approximately $30 per 1,000 copies for an annual cost of $1,860.

Socorro ISD prints its newsletter, @ *Socorro*, in both English and Spanish. The front page is multicolor and the inside is two-color. Each article has the Spanish translation alongside the English version. It is mailed to all of the parents once every two months. Because Spanish is the primary language in many households in the district, translating the newsletter into Spanish helps ensure that it reaches its intended audience. A TSPR survey

of Socorro ISD revealed that a majority of SISD's stakeholders felt that the district does a good job of communicating with the community. Since @ *Socorro* is one of the district's primary means of communicating with the community, the survey results indicate that @ *Socorro* is working well. As an added note, Socorro ISD puts an electronic copy of the newsletter on their Web site in the Department of Communications Web page.

Recommendation 33:

Publish and print the district's newsletter, *News Review*, in both English and Spanish to improve district communications with the 90 percent Hispanic population.

Because 90 percent of the population of Brownsville speaks Spanish and just over 90 percent of Brownsville's population is of Hispanic descent, having an informational publication in Spanish as well as English is essential for district information to be available to everyone.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent obtains board approval to publish *News Review* in English and Spanish.	June 2003
2.	Bilingual staff in the Public Information Office translate each edition of *News Review*.	Five Times Annually
3.	The graphic layout artist designs the layout of the newsletter using both the Spanish and English versions.	Five Times Annually
4.	The graphic layout artist sends the layout to the contracted printer for printing.	Five Times Annually
5.	The Public Information Officedistributes the appropriate number of copies to the Mail Room for internal distribution, the *Brownsville Herald* and the *Bargain Shopper*.	Five Times Annually

FISCAL IMPACT

The cost of producing the current version of *News Review is* $20,100 annually ($0.06 per copy x 67,000 copies x 5 issues.) Printing a bilingual version would approximately double the size of the newsletter, as well as the cost, to $0.12. At an additional $0.06 per copy, 67,000 copies per issue and five issues per year, the revised publication would cost BISD an additional $20,100 per year [($0.12 x 67,000 copies) x 5 issues.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08

Print the district's newsletter, *News Review*, in both English and Spanish to improve district communications with the 90 percent Hispanic population.	($20,100)	($20,100)	($20,100)	($20,100)	($20,100)

FINDING

Distributing three versions of the school calendar to district departments and employees each year is not cost efficient. The Public Information Office produces and distributes a planning calendar, a pocket calendar and a wall calendar to BISD departments and employees each year. Approximately 7,500 copies of the planning calendar are distributed to district employees. The calendar lists events taking place during each day of the month including, but not limited to, board meetings, staff development, in-services and Texas Assessment of Academic Skills (TAAS) testing. The district does not have the capability to produce the calendar in-house, so production is outsourced. The outsourcing company is selected through the competitive bidding processes annually. District employees like the calendar because it not only informs them of important events taking place within the district, but it is also large enough to allow space to write in the boxes as necessary.

A wall calendar is also produced and distributed each year. The wall calendar is a consolidated, more concise version of the planning calendar. The monthly wall calendar has colored boxes around the days of the month, depending on the event taking place. For example, holidays are depicted with a purple box around the date(s) during which the holiday takes place. Only nine events are shown on the wall calendar: holidays, end of six weeks, end of nine weeks, make-up days, early dismissal, teacher preparation, staff development, and new teacher in-service. Five wall calendars are sent to each school in the district, and the school administrators are given the discretion as to how to use them and where to display them.

The third calendar, a tri-fold pocket version, is also produced and distributed each year. The pocket calendar is essentially a shrunken version of the wall calendar. It differs, however, from the wall calendar in that it lists each school's hours of operation on the back of the calendar, as well as a list of the Board of Trustee members. In addition, graduation dates for each of the district's five high schools, the first day of class, the last day of class, early dismissal and make up days and holidays and vacations are listed. With the exception of the graduation dates, all of this information is already contained on the front side of the pocket calendar.

Ten copies of the pocket calendar are sent to each school in the district. As with the wall calendars, each school administrator is given the discretion as to how to use the pocket calendars. The three versions of the calendar create redundancies in information and ultimately add an unnecessary cost to district operations.

Many districts across the state develop calendars for their employees as well as the community so they may be up-to-date on events occurring across the district throughout the year. Consolidating all the information into one, easy-to-use version, reduces costs.

Recommendation 34:

Discontinue production and distribution of the wall and pocket calendars.

The planning calendars are an excellent means of communicating important dates and events with the district's employees in a usable format. The information contained in the wall calendar and pocket calendar, however, is redundant and does not provide enough added benefit to justify expending the resources necessary to create them.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Public Information officer sends notification to district employees that the wall calendar and pocket calendar will no longer be produced and distributed after 2002-03.	March 2003
2.	The Public Information Office continues production of the planning calendar and distributes them during in-services at the beginning of the year.	August 2003 and Ongoing

FISCAL IMPACT

The cost of producing the wall calendar is $0.90. The total cost of producing five yearly copies for each of the 50 schools is $225. The cost of producing the pocket calendar is $0.70. The total cost of producing 10 yearly copies for each of the 50 schools is $350. As a result of discontinuing production of the two calendars, the total annual savings is $575 ($225 + $350).

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Discontinue production and distribution of the wall calendar and pocket calendar.	$575	$575	$575	$575	$575

Chapter 4
COMMUNITY INVOLVEMENT

D. PARENTAL INVOLVEMENT

Parental involvement is an important subset of the community involvement function that includes, but is not limited to, involving parents in the schools as volunteers, providing training and literacy classes in which parents can participate and keeping parents informed of district information, programs, meetings and events.

BISD provides various opportunities for parents to become involved with the district, some of which are listed below.

- A majority of BISD schools have an active Parent Teacher Association (PTA) or Parent Teacher Organization (PTO) that supports the school through fundraising activities and a variety of projects. Each year, the PTAs from each school participate in an annual conference during which leaders from each PTA can share ideas and awards are distributed for exceptional performance.
- Each of the five high schools has an active athletic, choir and/or band booster club. The booster clubs support these student organizations through fundraising activities designed to raise money for various things including trips, snacks and scholarships.
- Parents are given the opportunity to serve on the District Education Improvement Committee (DEIC) and the campus site-based decision-making (SBDM) teams.
- Each school has a parent center, which is an area in the school set aside especially for parents to find information about their child's school, read about upcoming events in the district, help teachers with special projects and participate in various classes offered throughout the year. BISD also has a districtwide parent education center.
- A Parent Advisory Council is open to all parents in the district and meets four times a year to discuss Title I and Migrant Education-related issues, programs and ideas.

The percent of economically disadvantaged students in BISD has progressively increased from 85.1 percent in 1996-97 to 92.8 percent in 2001-02. This large percent of economically disadvantaged students qualifies the district for federal funding granted by the Elementary and Secondary Education Act's (ESEA) Title I program. School districts receiving Title I funds are mandated to follow federal regulations requiring a comprehensive parental involvement program, including

services such as literacy training and volunteer opportunities that help parents support the education of their children.

The Federal Programs Office started a Parental Involvement program to suffice the ESEA requirement that all recipients of Title I, Part A grant monies develop a parental involvement program. The program is very well organized and has an enthusiastic staff of individuals committed to involving parents in the district. The head of the program, the Federal Programs administrator, is hoping to continue improving the Parental Involvement program toward an end goal of having a state model program.

FINDING

The Parental Involvement program has a clearlydefined set of goals used to direct the program toward accomplishing its purpose. The employees of the department of Parental Involvement develop the goals and the purpose. The purpose of the program, according to the program handbook, is to obtain a strong commitment to parent and family involvement through the achievement of organizational goals and parent center activities. The handbook clearly states the district's priority to help parents realize the importance of becoming involved in their children's education and recognizes that parents are the primary influence in their children's lives.

To carry out their purpose, the employees of the department of Parental Involvement have developed well-defined goals:

- make parents aware of the program through personal phone calls, post cards, flyers by mail and with registration packets;
- involve parents in their children's schools and education;
- communicate with parents at meetings where they learn important strategies for boosting children's learning;
- demonstrate valuable learning ideas for parents to use at home in order to help their children as well as themselves;
- foster an inviting atmosphere at schools through community building activities;
- provide a place where parents can learn about other cultures and support each other with their problems and/or concerns, and,
- foster better communication between parents, teachers and administrators.

The Parental Involvement program also has a belief statement, "When school and home collaborate on behalf of children, they create windows of light for the generations that follow."

COMMENDATION

BISD's Parental Involvement program has a well-defined set of goals used to direct the program toward accomplishing its purpose.

FINDING

The Federal Programs administrator displays a commitment to volunteerism in schools by granting each of the employees in the Federal Programs Office leave time each week to participate in volunteer activities. During 2001-02, the Federal Programs administrator assigned approximately 40 employees to a school and allowed each person one hour of leave time to volunteer at that school. According to the Federal Programs administrator, this allows the employees in the Federal Programs Office to "walk the talk." In other words, they not only set a program goal to increase volunteerism in schools, but they also contribute to attaining the goal by committing their own resources to the effort. By volunteering, Parental Involvement employees are able to see first hand what goes on at the parent centers, and the level of involvement at each center, as well as what is working and what needs improvement. They can bring this knowledge back Parental Involvement to incorporate into program planning.

COMMENDATION

The staff of the Federal Programs Office at BISD displays a commitment to volunteerism by volunteering for one hour per week at one of the district's schools.

FINDING

The school parent centers and the districtwide parent education center offer a wide variety of activities and programs for parents. As a result of the Parental Involvement program, each of the district's 50 schools has a parent center staffed with a full-time parent liaison. The responsibilities of the parent liaisons are to identify, monitor and coordinate parental involvement activities at their respective parent centers, monitor attendance records for the purpose of identifying attendance problems, conduct home visits for students with attendance problems, communicate results of home visits with school personnel and assist with the identification of migrant and immigrant students.

In addition to the school parent centers, there is also a districtwide parent education center. The staff of the parent education center includes the coordinator for Parental Involvement, a secretary and six parent trainers. All of the schools in the district are divided up into six clusters based on the size of the school. A parent trainer is given responsibility for monitoring and coordinating the activities that take place in the parent

center at one of those six clusters. The parent trainers are also responsible for assisting in planning and providing training sessions for parents and assuming responsibility for maintaining records and preparing reports for each of the parent centers for which they are in charge.

The coordinator for Parental Involvement, a position that is currently vacant, is in charge of overseeing the districtwide parent education center. In addition, the coordinator oversees the Parent Advisory Council (PAC). Each year, officers are elected to serve one-year terms on the PAC. The officers are a President, Vice-President, Secretary and Parliamentarian. Officials are nominated and elected at-large by persons in attendance at the election meeting. The PAC meets four additional times each year to discuss programs, activities and issues surrounding the Title I and Migrant Education programs, as well as to solicit input and feedback from parents.

Some of the activities and programs with which parents can become involved take place at the school parent centers, while others take place at the districtwide parent education center. Some of the activities include fall and spring conferences, guitar lessons, dancing lessons, English classes, nutrition classes, arts and crafts classes, National Science Foundation math and science parent classes and a Mother's Day ceremony.

The districtwide parent education center produces a quarterly newsletter called *The Beacon*. Each of the parent trainers submit information to be included in the newsletter. After the Parental Involvement coordinator receives all of the submissions, they are consolidated into one document and sent to the media center for printing. The newsletter is then sent to all of the schools and is sent home with each student to take home to their parents. The newsletter is printed in both English and Spanish and includes parenting tips such as how to motivate your child and how to properly discipline a child. In addition to parenting tips, the newsletter offers a question and answer section, inspirational quotes, upcoming events at the parent centers and activity ideas.

BISD's Adult Education Program also was awarded Barbara Bush Foundation grant money to identify and serve migrant adults by offering alternative learning opportunities that will enable the targeted population to continue their education. The grant is the only one of its kind in the United States. Migrant parents who are enrolled in an ABE/GED are afforded alternatives to attend adult education classes. Offerings are both day and evening, which is convenient for working parents.

The Adult Education Center (also known in Spanish as *El Instituto Nacional Para Adultos)* also allows participants to obtain an official elementary and/or secondary certificate from Mexico. The joint venture is possible in collaboration with the Brownsville Mexican Consulate and

BISD. Brownsville is only one of five sites selected in Texas as a satellite to provide instruction to parents and adult learners.

In November 2002, BISD's adult education coordinator received honorable mention by the Texas Education Agency as "an outstanding coordinator in adult education in Brownsville ISD..." and was also recognized as having assumed the responsibility for "...coordinating and implementing training in the valley and surrounding areas" by providing "...invaluable services to the undereducated in the area." (Source: Texas Education Agency letter, Division of Adult and Community Education, November 20, 2002).

COMMENDATION

BISD's parent centers use a variety of methods to involve parents and enhance continuing education opportunities for migrants.

FINDING

Responses from school administrators and teachers indicate that, despite the wide variety of activities offered to parents, the district does not have a sufficient number of volunteers to help student and school programs. A majority of district administrators and parents feel that the schools have plenty of volunteers to help student and school programs. However, a majority of the principals, assistant principals and teachers disagree. The responses are summarized in **Exhibit 4-11**.

Exhibit 4-11
Survey Responses
Schools have plenty of volunteers to help student and school programs

Group	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Administrators	22.3%	52.7%	7.4%	10.8%	4.1%	2.7%
Principals and Assistant Principals	0.0%	34.8%	8.7%	43.5%	13.0%	0.0%
Teachers	5.7%	29.1%	13.9%	39.9%	11.4%	0.0%
Parents	14.1%	36.6%	22.1%	20.7%	5.1%	1.4%

Source: TSPR Survey Results, September 2002.
Note: While the surveys are not scientifically administered, in a random sampling of 700

The parent liaisons at each school are in charge of not only overseeing the activities taking place in their parent center, but also meeting with school administrators to determine which teachers need a classroom volunteer and then prioritizing the total needs based on the total number of volunteers available that day.

In order for a parent to become a classroom volunteer, they must go through screening at the personnel office. During this screening, they fill out an application, receive a TB shot and background check and show proof of social security. If a parent does not wish to volunteer in the classroom and/or does not receive classroom clearance, they are still able to participate at the parent centers and the districtwide parent education center. If a parent does receive clearance to volunteer in the classroom, they go to the school at which they wish to volunteer and the parent liaison pairs them with a teacher who has requested volunteer assistance in his/her classroom. If there is an insufficient number of volunteers for the number of teachers requesting volunteers, teacher requests are prioritized and those with the highest priority receive volunteers that day.

Through survey results, public forum comments, focus group comments and interviews, the TSPR team was able to determine two commonly noted reasons why there is a shortage of classroom volunteers in the district. First, Brownsville's proximity to the U.S./Mexico BORDER=1 leads to a high number of non-documented immigrant children in the district. Because classroom volunteers are required to go through a screening process that includes proof of social security registration, many of the parents of these children are unable to receive clearance to volunteer in the classroom. Some even avoid the screening process altogether because they know that proof of social security is required.

Second, the city of Brownsville has a low per capita income, with more than half of households earning less than $25,000 per year. Classroom volunteers are needed during school hours, which conflict with most peoples' work hours. It is difficult for parents to come to the schools during the day because doing so would result in missing work and forfeiting wages. One parent said she is not able to help her child's teacher by volunteering because of conflicting work hours.

Although some of the conditions that contribute to a lack of classroom volunteers at BISD are unique, many districts face the same problem. To resolve the issue, they look to organizations outside the district to recruit volunteers at no cost to the district. Due to the advent of "No Child Left

Behind" legislation, on October 17, 2002, the United States Secretary of Education announced a Partnership for Excellence in Latino Higher Education, a three-year initiative to increase parental involvement in K-12 schools in Latino communities across the country. The program will be an additional resource to the BISD in tapping local volunteer potential.

Numerous Web sites exist that list volunteer organizations across the country and state. Search criteria can be entered that allow the user to search the volunteer organizations that exist in and around an area, as well as those that provide national assistance. Search criteria can also be entered for type of service delivered. Volunteer organizations, such as the Volunteer Center and Retired Senior Volunteer Programs (RSVP), to mention a few, actively seek to increase their volunteer presence in local communities across the nation and are consulted for their volunteer recruitment experience.

Recommendation 35:

Contact national non-profit organizations to recruit volunteers and implement volunteer incentive initiatives for the community at no cost to the district to fill gaps in the service delivery.

TSPR is cognizant that the volunteer resources in the BISD metropolitan are already strained due to the demographic profile. Accordingly, the district may benefit by looking to national volunteer clearinghouses and related non-profit organizations for assistance. The coordinator for Parental Involvement's research should include the "No Child Left Behind"website, http://www.nochildleftbehind.gov/, as well as the Department of Education's website.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Parental Involvement coordinator begins researching non-profit organizations.	March 2003
2.	The Parental Involvement coordinator contacts the non-profit organizations that could potentially contribute resources to the district.	Ongoing
3.	The Parental Involvement coordinator and the Public Information officer announce and facilitate a joint strategic planning forum with volunteer clearinghouse representatives, parents and teachers to identify strategies to increase involvement and to seek grants to increase community and parental involvement.	May 2003
4.	The Parental Involvement coordinator and the Public Information officer develop a strategic plan with specific timelines to	June 2003 and

	implementation, providing parents and the community with regular progress updates.	Ongoing
5.	The Parental Involvement coordinator works with interested organizations to allocate resources to the district.	Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The school parent centers and the district parent education center have limited hours of operation. Most classes, events and activities are offered between the hours of 9 a.m. and 4 p.m. The parent centers function to involve parents in the district, to communicate with parents through newsletters and phone calls, to provide special presentations and parenting classes and to provide literacy training. Although the classes and presentations offered are very beneficial, not all parents are able to reap the benefits, since they are unable to miss work.

The review team received binders with agendas and sign-in sheets for activities, presentations and classes that took place throughout 2001-02 at the districtwide parent education center and the school parent centers. A review of the binder revealed that a majority of them are offered only during the day. **Exhibit 4-12** shows a sample of the activities, presentations and classes that took place during 2001-02. Out of the 40 listed, only one was offered in the evening.

Exhibit 4-12
Sample of Parent Center Classes, Dates and Times
2001-02

Title of Event	Date	Time
Planning Committee Meeting for Fall Parent Conference	Thursday, September 6, 2001	10:00 a.m.-11:30 a.m.
Welcome Back Parent Meeting	Friday, September 14, 2001	10:00 a.m.-11:30 a.m.
Parental Involvement Day "Fall Open House"	Monday, November 12, 2001	9:00 a.m.-4:00 p.m.
Identifying Your Child's Talents	Friday, November 9, 2001	8:30 a.m.-9:30 a.m.
All You Should Know Regarding T.A.A.S.	Thursday, September	6:30 p.m.-

	6, 2001	8:30 p.m.
Nutrition Classes	Friday, November 2, 2001	9:00 a.m.-11:00 a.m.
Christmas Craft Fair	Friday, December 7, 2001	9:30 a.m.-11:30 a.m.
Mother's Day Celebration	Thursday, May 9, 2002	9:30 a.m.-11:30 a.m.
Learning Something New Everyday	Thursday, September 13, 2001	9:00 a.m.-10:00 a.m.
Parent Teacher Conference	Friday, October 5, 2001	8:30 a.m.-9:30 a.m.
Discipline With Love	Thursday, October 4, 2001	2:00 p.m.-3:00 p.m.
Parent Meeting	Monday, October 9, 2001	9:30 a.m.-10:30 a.m.
Understanding Changes In Our Children	Tuesday, October 16, 2001	9:00 a.m.-10:00 a.m.
Developing Positive Traits In The Family	Tuesday, October 30, 2001	9:00 a.m.-10:00 a.m.
Steps To Developing Better Communication	Tuesday, November 6, 2001	9:00 a.m.-10:00 a.m.
Violence In The Family	Wednesday, November 7, 2001	9:00 a.m.-10:00 a.m.
Helping Your Child To Be Responsible	Thursday, November 8, 2001	9:00 a.m.-10:00 a.m.
The Importance Of Attendance and Homework	Tuesday, November 20. 2001	2:00 p.m.-3:00 p.m.
Protecting Your Child Against Crime	Tuesday, November 20, 2001	9:00 a.m.-10:00 a.m.
Pressures Affecting Your Children	Wednesday, December 12, 2001	9:30 a.m.-10:30 a.m.
Developing Good Emotional Health In Your Children	Tuesday, December 6, 2001	2:00 p.m.-3:00 p.m.
Parent With Power: Lesson #1 "The Reality Of Our Situation"	Monday, January 28, 2001	9:00 a.m.-10:00 a.m.
What Parents Should Know About Gangs	Monday, January 14,	9:00 a.m.-

	2002	10:00 a.m.
Factors That Lead To The Use Of Drugs	Wednesday, February 13, 2002	9:30 a.m.-10:30 a.m.
All You Should Know Regarding The New T.E.K.S (T.A.A.S.) Test	Friday, February 01, 2002	8:30 a.m.-9:30 am.
Parent With Power: Lesson #2 "Love And Communication"	Monday, February 11, 2002	9:00 a.m.-10:00 a.m.
Recognition Day!	Tuesday, May 14, 2002	9:30 a.m.-10:30 a.m.
The Importance Of Reading In The Family.	Friday, October 26, 2001	9:00 a.m.-10:00 a.m.
Parent With Power: Lesson #3 "Growing A Family"	Monday, February 25, 2002	9:00 a.m.-10:00 a.m.
The Importance Of Attendance	Friday, October 12, 2001	9:00 a.m.-10:00 a.m.
Identifying Aggressive Behavior	Thursday, November 15, 2001	2:00 p.m.-3:00 p.m.
Valuing The Opportunities In Education	Tuesday, January 29, 2002	9:00 a.m.-10:00 a.m.
Understanding The Teacher's Role	Tuesday, February 12, 2002	1:45 p.m.-2:45 p.m.
Identifying Our Children's Talents	Wednesday, March 20, 2002	2:00 p.m.-3:00 p.m.
Single Parenting	Monday, December 17, 2001	9:30 a.m.-10:30 a.m.
Suicide: Listen To Your Children Before It's Too Late	Wednesday, January 23, 2002	3:30 p.m.-4:30 p.m.
The Importance Of A Father's Role In Education	Tuesday, April 2, 2002	3:30 p.m.-4:30 p.m.
Developing Good Emotional Health In Your Children	Tuesday, April 30, 2002	3:30 p.m.-4:30 p.m.
Parents Against Drugs	Tuesday, May 7, 2002	3:30 p.m.-4:30 p.m.
Identifying Different Types Of Abuse	Thursday, November 8, 2001	8:30 a.m.-9:30 a.m.

Source: Parent Center Sign-In Sheets, Federal Programs Office, 2002.

While some of these events and classes had attendance as low as three people, the events and classes were generally well attended, with over 100 people in attendance at some classes. The high attendance rates indicate the success of the programs. Unfortunately, parents who are not able to attend during the day, due to work or other circumstances, have to miss out on what the events and classes have to offer.

The review team heard many comments about parents' perception of the district's parental involvement efforts. While TSPR surveys are not scientifically administered, they represent a random sampling of parents and other stakeholders. Results and comments are provided as one measure of general opinion of survey respondents. **Exhibit 4-13** presents some of the comments received.

Exhibit 4-13
Public Comments Regarding
BISD Parental Involvement 2002

Survey Respondent Comments
• Could school parents meetings be after 5 p.m. so I may attend? They used to be once a month; now it's on a daily basis from 8:30 until 10:30 a.m. I cannot attend these either. The time allocated for school meetings is at a time not possible for many parents. A.A. Champion is the same. The time allocated for school meetings is at a time not possible for many parents. Single parents must work 8-5. • Being a single parent, it is difficult to participate in school activities. Especially now that I acquired a full time job. • I have not been around teachers very much because of my work hours. • Schools have different meetings every so often but we can't go because the meetings are about 11 a.m. We work at that time.

Source: TSPR Survey Results and Public Forum Comments, September 2002.

Parental involvement programs that are scheduled at convenient times for working parents often have a positive effect on parent turnout. The Family Services department at San Angelo ISD provides a number of programs for increasing and facilitating parental involvement in SAISD. In one year, the department was able to increase the number of volunteer hours almost 38 percent.

Recommendation 36:

Adjust the parent education centers' schedules and hours of operation to promote parent participation.

The schedule adjustment needs to be implemented through staggered staff schedules to avoid incurring overtime costs. Under federal wage and hour laws, any hours worked in excess of 40 hours weekly by non-exempt positions require an employer to pay overtime.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The coordinator for Parental Involvement analyzes the 2001-02 Title I parent survey to identify days and times that would be most convenient for a majority of parents to attend meetings and classes.	March 2003
2.	The coordinator for Parental Involvement meets with the parent liaisons to discuss adjusting parent center hours to be conducive with the survey results.	April 2003
3.	The coordinator for Parental Involvement selects two or three schools in which to pilot the program and to observe its success before full implementation.	April 2003
4.	The coordinator for Parental Involvement modifies parent education center times to meet parent needs and increase overall participation.	May 2003
5.	The coordinator conducts an annual informal parent forum to determine whether parents' needs have changed, or if the schedule remains convenient.	March 2004 and Annually Thereafter

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 5
FACILITIES USE AND MANAGEMENT

This chapter reviews facilities use and management of the Brownsville Independent School District (BISD) in the following sections:

A. Facilities Planning, Management and Organization
B. Construction Management and Contracting
C. Maintenance Operations
D. Custodial Operations
E. Energy Management

Effective facilities management ensures that a district has enough facilities that are designed and built in a way that enhances a district's primary educational programs; ensures that facilities comply with state, local and federal regulations; and minimizes the district's utility and maintenance costs. Efficient facilities are essential to building public trust and confidence in district management.

BACKGROUND

BISD covers 95 square miles in far south Texas along the Rio Grande River Valley. During 2001-02, its enrollment totaled 42,541 students, 5.5 percent more than in 1998-99. Its 50 schools include 32 elementary schools, 10 Middle Schools, five High Schools and three special-purpose schools, a total of 4.7 million gross square feet (GSF) of permanent space. The district also has 18 support facilities that add another 314,535 GSF. Total BISD facilities include approximately 5.4 million square feet of space and are described in **Exhibit 5-1**.

Exhibit 5-1
BISD Facilities
2002-03

School	Date Opened	Site Acreage	Permanent Area (GSF)	Portable Area (GSF)	Total Area (GSF)	2001-02 Enrollment	GSF per Student
Aiken Elementary	1996	38.4	95,382	35,904	131,286	800	164
Benavides Elementary	1999	20.0	78,921	0	78,921	802	98
Burns Elementary	1983	16.7	87,593	8,832	96,425	983	98

Canales Elementary	1949	11.3	75,543	672	76,215	776	98
Castaneda Elementary	2000	5.5	69,400	0	69,400	597	116
Champion Elementary	2001	12.0	78,209	0	78,209	717	109
Clearwater Elementary	1921	3.0	38,795	2,748	41,543	388	107
Cromack Elementary	1953	8.4	77,366	0	77,366	834	93
Del Castillo Elementary	1974	11.0	42,323	10,080	52,403	556	94
Egly Elementary	1977	12.0	64,841	4,896	69,737	968	72
El Jardin Elementary	1925	20.0	80,677	10,642	91,319	951	96
Gallegos Elementary	2001	40.0	78,209	0	78,209	592	132
Garden Park Elementary	1960	8.0	72,824	0	72,824	820	89
Garza Elementary	1977	16.1	63,736	3,936	67,672	831	81
Gonzalez Elementary	1986	18.5	81,629	6,720	88,349	1,070	83
Hudson Elementary	1998	14.0	76,700	7,680	84,380	871	97
Longoria Elementary	1929	3.6	45,412	6,144	51,556	458	113
Martin Elementary	1953	12.0	67,600	3,744	71,344	674	106
Morningside Elementary	1986	49.0	73,916	5,568	79,484	849	94
Palm Grove Elementary	1975	6.0	53,015	2,112	55,127	551	100
Paredes Elementary	2002	20.7	79,804	0	79,804	638	125

Perez Elementary	1974	10.4	52,592	2,304	54,896	592	93
Put gnat Elementary	1915	4.0	61,973	1,920	63,893	593	108
Resaca Elementary	1931	2.5	31,043	7,680	38,723	386	100
Russell Elementary	1921	10.0	70,036	4,912	74,948	899	83
Sharp Elementary	1931	4.4	40,196	7,172	47,368	496	96
Skinner Elementary	1925	7.0	49,847	7,488	57,335	640	90
Southmost Elementary	1988	10.9	67,117	1,536	68,653	698	98
Vermillion Elementary	1980	18.0	78,528	1,344	79,872	997	80
Victoria Heights Elementary	1926	5.0	45,691	9,120	54,811	635	86
Villa Nueva Elementary	1935	3.0	32,114	8,664	40,778	432	94
Yturria Elementary	1992	21.3	61,921	1,632	63,553	823	77
Besterio Middle School	1993	38.4	153,879	34,464	188,343	1,101	171
Central Middle School	1916	5.0	142,633	6,720	149,353	828	180
Cummings Middle School	1950	11.0	94,796	7,392	102,188	936	109
Faulk Middle School	1956	21.0	100,646	4,704	105,350	907	116
Garcia Middle School	2002	20.0	120,927	0	120,927	0	N/A
Lucio Middle	1997	14.0	119,311	768	120,079	995	121

School							
Oliveira Middle School	1979	19.2	127,116	3,552	130,668	1,204	109
Perkins Middle School	1987	19.3	140,577	1,344	141,921	1,181	120
Stell Middle School	1956	25.0	103,232	9,792	113,024	992	114
Vela Middle School	1990	21.6	131,498	5,952	137,450	1,238	111
Hanna High School	1967	87.0	315,675	32,256	347,931	2,613	133
Lopez High School	1993	72.0	304,891	0	304,891	1,735	176
Pace High School	1975	25.0	194,283	15,360	209,643	1,952	107
Porter High School	1974	36.0	216,243	25,056	241,299	1,870	129
Rivera High School	1988	34.0	315,961	0	315,961	1,903	166
Alternative Center/Webb	1921	1.7	17,951	3,072	21,023	15	1,402
Lincoln Park	1980	112.0	39,510	0	39,510	154	257
Teen Learning Center	1998	N/A	0	10,944	10,944	0	N/A
Attendance	N/A	N/A	8,755	0	8,755	N/A	N/A
Admissions/ Attendance	1987	N/A	10,654	0	10,654	N/A	N/A
Adult Education	1975	N/A	7,140	0	7,140	N/A	N/A
Assessment, Research and Evaluation	1984	N/A	1,344	0	1,344	N/A	N/A
Encampment	1986	N/A	2,088	0	2,088	N/A	N/A
Facilities	1950	N/A	55,344	0	55,344	N/A	N/A

Compound							
Fine Arts	1994	N/A	2,312	0	2,312	N/A	N/A
Food Service	1984	N/A	22,077	0	22,077	N/A	N/A
Health Services	1968	N/A	1,601	0	1,601	N/A	N/A
Main Admin Building	1987	N/A	57,559	0	57,559	N/A	N/A
Media Center	1968	N/A	4,847	0	4,847	N/A	N/A
Migrant Office	1944	N/A	2,480	0	2,480	N/A	N/A
Parental Involvement	1935	N/A	3,018	0	3,018	N/A	N/A
Sam Stadium	1953	N/A	48,658	0	48,658	N/A	N/A
Special Service	1986	N/A	10,729	0	10,729	N/A	N/A
Tax Office	N/A	N/A	1,152	0	1,152	N/A	N/A
Transportation Department	1979	N/A	64,777	0	64,777	N/A	N/A
Rockwell Warehouse	1992	N/A	10,000	0	10,000	N/A	N/A
Total		**1,004.9**	**5,026,617**	**324,826**	**5,351,443**	**42,541**	

Source: BISD Facilities Department and Texas Education Agency (TEA), Public Education Information Management System (PEIMS), 2001-02.

In 1997, the Brownsville Community voted to approve a $100 million bond issue, designated as the 1997-1998 BISD Bond Program. The first $25 million of this program was administered as a regular bond program. The remaining $75 million of construction projects are part of the State Instructional Facilities Allotment (IFA) Grant Program. Under the IFA program, the State reimburses the district approximately 80 percent of the annual debt service cost associated with the bonds that funded the projects, with the district paying the remaining 20 percent out of local tax collections. **Exhibit 5-2** lists the projects in the original 1997-1998 BISD Bond Program.

Exhibit 5-2
BISD Bond Program
1997-98

Planned Expenditure	Total
Land	$2,855,000
New Elementary Schools	$27,500,000
New Middle Schools	$9,500,000
New High Schools	$21,000,000
Other Projects	$4,000,000
New Classroom Wings	$10,580,000
Renovations	$10,975,000
Building Expansions	$930,000
Parking Lot Expansions	$945,000
Mini Gyms	$2,685,000
New Gym	$7,500,000
Gym Floor and Bleachers	$1,530,000
Total	**$100,000,000**

Source: BISD Facilities Department, September 2002.

The 1997-98 BISD Bond Program anticipated building five new elementary schools, one new middle school and one new high school. During the administration of the bond program, the original budget and anticipated improvements were revised.

In total, the $100 million 1997-98 BISD Bond Program is being used to fund new educational facilities, as well as additional facilities and improvements. New elementary schools included in the program are Benavides Elementary School, Castenada Elementary School, Champion Elementary School, Gallegos Elementary School, Hudson Elementary School, Paredes Elementary School and Elementary School #139.New middle schools include Garcia Middle School, Lucio Middle School and Middle School #11. The IFA Grant Program funds the projects shown in **Exhibit 5-3** and

Exhibit 5-4.

Exhibit 5-3
IFA Application #1
2000-01

School	Expenditure	Improvement	Status
Elementary School #136	$5,500,000	New School	Completed
Elementary School #137	$6,000,000	New School	Completed
Elementary School #138	$6,000,000	New School	Completed
Middle School #10	$9,500,000	New School	95 Percent Complete
Martin Elementary School	$480,000	6 Classroom Wing Addition	Completed
Russell Elementary School	$900,000	10 Classroom Wing Addition	Completed
Villa Nueva Elementary School	$600,000	8 Classroom Wing Addition	Completed
Cummings Middle School	$1,000,000	12 Classroom Wing Addition	Completed
Faulk Middle School	$900,000	12 Classroom Wing Addition	Completed
Stell Middle School	$900,000	12 Classroom Wing Addition	Completed
Hanna High School	$1,800,000	24 Classroom Wing Addition	Completed
Lincoln Park High School	$400,000	6 Classroom Wing Addition	Completed
20 Elementary Schools	$2,825,000	20 Mini Gy Middle School	75 Percent Complete
Total	**$36,805,000**		

Source: BISD Facilities Department, Instructional Facilities Allotment (IFA) Application.

Exhibit 5-4
IFA Application #2
2000-01

School	Expenditure	Improvement	Improvement
Elementary School #139	$7,055,000	New School	Bidding Phase
Hanna High School	$3,000,000	28 Classroom Wing Addition	Design Phase
Hanna High School	$1,700,000	General Renovation	Design Phase
Pace High School	$3,000,000	28 Classroom Wing Addition	Design Phase
Pace High School	$1,700,000	General Renovation	Design Phase
Porter High School	$3,000,000	28 Classroom Wing Addition	Design Phase
Porter High School	$1,700,000	General Renovation	Design Phase
Russell Elementary School	$1,600,000	10 Classroom Wing Addition	Design Phase
Sharp Elementary School	$500,000	General Renovation	Design Phase
Skinner Elementary School	$2,000,000	14 Classroom Wing Addition	Design Phase
Middle School #11	$11,500,000	New School	In Design
Middle School #11	$450,000	Land Purchase	Completed
Villa Nueva Elementary School	$940,000	9 Classroom Wing Addition	Design Phase
Total	**$38,145,000**		

Source: BISD Facilities Department, IFA Application.

The 1994 Texas School Performance Review (TSPR) of BISD indicated that 27 of 40 schools were below square foot per student guidelines and only 13 schools were at or above these guidelines. As shown in **Exhibit 5-5**, the construction of new schools and classroom additions has now reduced the number of schools below guidelines from 27 to 11. The remaining schools either meet or exceed the guidelines.

Exhibit 5-5
Area per Student for BISD Schools
2002-03

School	Date Opened	Total Area (GSF)	2001-02 Enrollment	GSF per Student	Guideline (GSF)	Below Guideline	At Guideline	Above Guideline
Aiken Elementary School	1996	131,286	800	164	85-100			X
Benavides Elementary School	1999	78,921	802	98	85-100		X	
Burns Elementary School	1983	96,425	983	98	85-100		X	
Canales Elementary School	1949	76,215	776	98	85-100		X	
Castaneda Elementary School	2000	69,400	597	116	85-100			X
Champion Elementary School	2001	78,209	717	109	85-100			X
Clearwater Elementary School	1921	41,543	388	107	85-100			X
Cromack Elementary School	1953	77,366	834	93	85-100		X	
Del Castillo Elementary School	1974	52,403	556	94	85-100		X	
Egly Elementary School	1977	69,737	968	72	85-100	X		
El Jardin Elementary School	1925	91,319	951	96	85-100		X	

Gallegos Elementary School	2001	78,209	592	132	85-100			X
Garden Park Elementary School	1960	72,824	820	89	85-100		X	
Garza Elementary School	1977	67,672	831	81	85-100	X		
Gonzalez Elementary School	1986	88,349	1,070	83	85-100	X		
Hudson Elementary School	1998	84,380	871	97	85-100		X	
Longoria Elementary School	1929	51,556	458	113	85-100			X
Martin Elementary School	1953	71,344	674	106	85-100		X	
Morningside Elementary School	1986	79,484	849	94	85-100		X	
Palm Grove Elementary School	1975	55,127	551	100	85-100		X	
Paredes Elementary School	2002	79,804	638	125	85-100			X
Perez Elementary School	1974	54,896	592	93	85-100		X	
Putegnat Elementary School	1915	63,893	593	108	85-100		X	
Resaca Elementary School	1931	38,723	386	100	85-100		X	

Russell Elementary School	1921	74,948	899	83	85-100	X		
Sharp Elementary School	1931	47,368	496	96	85-100		X	
Skinner Elementary School	1925	57,335	640	90	85-100		X	
Southmost Elementary School	1988	68,653	698	98	85-100		X	
Vermillion Elementary School	1980	79,872	997	80	85-100	X		
Victoria Heights Elementary School	1926	54,811	635	86	85-100		X	
Villa Nueva Elementary School	1935	40,778	432	94	85-100		X	
Yturria Elementary School	1992	63,553	823	77	85-100	X		
Besterio Middle School	1993	188,343	1,101	171	110-125			X
Central Middle School	1916	149,353	828	180	110-125			X
Cummings Middle School	1950	102,188	936	109	110-125	X		
Faulk Middle School	1956	105,350	907	116	110-125		X	
Garcia Middle	2002	120,927	0	N/A	110-125	N/A	N/A	N/A

School								
Lucio Middle School	1997	120,079	995	121	110-125		X	
Oliveira Middle School	1979	130,668	1,204	109	110-125	X		
Perkins Middle School	1987	141,921	1,181	120	110-125		X	
Stell Middle School	1956	113,024	992	114	110-125		X	
Vela Middle School	1990	137,450	1,238	111	110-125		X	
Hanna High School	1967	347,931	2,613	133	135-150	X		
Lopez High School	1993	304,891	1,735	176	135-150			X
Pace High School	1975	209,643	1,952	107	135-150	X		
Porter High School	1974	241,299	1,870	129	135-150	X		
Rivera High School	1988	315,961	1,903	166	135-150			X
Total						**11**	**24**	**11**

Chapter 5
FACILITIES USE AND MANAGEMENT

A. FACILITIES PLANNING, MANAGEMENT AND ORGANIZATION

The Facilities Department oversees capital-improvement projects ranging from the construction of complete new permanent facilities to major building repairs. The Maintenance Department performs routine building maintenance, most minor building repairs and grounds maintenance and upkeep. Custodial Operations is responsible for general cleaning of BISD facilities, coordination of portable buildings and some building repairs.

FINDING

The organizational structure of BISD's facilities, maintenance and custodial operations is not logically aligned, nor does it effectively support accountability. Before 1999-2000, these units all reported to a single administrator, who in turn reported to an area superintendent. This structure proved difficult as the administrator's workload grew due to the 1997-1998 bond program. In 2001, BISD reorganized the departments, creating an administrator for facilities and an administrator for maintenance, both currently report to the interim superintendent. Custodial Operations is currently under the Central Warehouse, even though no natural relationship exists between the two units. Custodial Operations' responsibility for coordinating portable buildings is also an unrelated function of Warehousing and is also not found under a Custodial Operation in most other school districts. This type of organization requires the interim superintendent to coordinate facilities issues between three departments.

The Facilities and Maintenance Departments conduct overlapping operations. The Maintenance Department has a Heating, Ventilation and Air-Conditioning (HVAC) crew responsible for repairs to the HVAC system and the Facilities Department also performs HVAC retrofits, which are funded through the capital-improvement budget. In addition, the HVAC crew performs retrofit projects, up to and including classroom wings. Similarly, the planning, maintenance and administration of portable buildings is currently divided between the organizations. While the Maintenance Department handles general maintenance and move issues, administrative inspections is the responsibility of the custodial/environmental supervisor. In the winter of 2002, two portable schools were constructed by the Maintenance Department, a capital projects function that is typically the responsibility of the Facilities Department.

Similarly the custodial staff at many BISD schools perform minor maintenance activities. These activities are generally based on the skills of the custodial staff and are under the direction of school administrators and the head custodian. Many times this allows unqualified personnel to perform maintenance or capital-construction projects without the benefit of proper supervision, quality control or maintenance schedule documentation.

Exhibit 5-6 presents the organization chart for the reporting relationships that include facilities, maintenance and custodial supervision.

Exhibit 5-6
Facilities Organizational Chart
2001-02

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                              ┌─────────────────────┐
                              │ Interim Superintendant │
                              └─────────────────────┘
                    ┌───────────────────┴───────────────────┐
          ┌─────────────────────┐              ┌─────────────────────┐
          │ Facilities Administrator │          │ Maintenance Administrator │
          └─────────────────────┘              └─────────────────────┘
                    │                    ┌──────────┴──────────┐
          ┌─────────────────────┐   ┌──────────┐      ┌──────────┐
          │ Administrative Secretary │  │ Secretary │      │ Purchasing │
          └─────────────────────┘   └──────────┘      └──────────┘
          ┌─────────────────────┐   ┌─────────────────────────┐
          │ Facilities Clerk    │   │ Drafter/Plans Coordinator │
          └─────────────────────┘   └─────────────────────────┘
          ┌─────────────────────┐
          │ Facilities Coordinator │        ┌──────────────┐
          └─────────────────────┘          │ Energy Manager │
          ┌─────────────────────┐          └──────────────┘
          │ Construction Inspector │           ┌──────────────────┐
          └─────────────────────┘             │ Electrical Foreman │
                                               └──────────────────┘
                                                      ┌────────┐
                                                      │ Trades │
                                                      └────────┘
                                               ┌──────────────────┐
                                               │ Mechanical Foreman │
                                               └──────────────────┘
                                                      ┌────────┐
                                                      │ Trades │
                                                      └────────┘
          ┌─────────────────────┐               ┌──────────────┐
          │ Interim Superintendant │             │ EMS Programmer │
          └─────────────────────┘               └──────────────┘
          ┌─────────────────────┐          ┌─────────────────────┐
          │ Central Warehouse   │          │ Maintenance Supervisor │
          └─────────────────────┘          └─────────────────────┘
      ┌──────────────────────────────┐        ┌──────────────────┐
      │ Custodial/Environmental Supervisor │   │ Warehouse Foreman │
      └──────────────────────────────┘        └──────────────────┘
                                             ┌─────────────────────────┐
                                             │ Office/Warehouse Supervisor │
                                             └─────────────────────────┘
                                               ┌────────────────┐
                                               │ Building Foreman │
                                               └────────────────┘
                                                      ┌────────┐
                                                      │ Trades │
                                                      └────────┘
                                               ┌────────────────┐
                                               │ Building Foreman │
                                               └────────────────┘
                                                      ┌────────┐
                                                      │ Trades │
                                                      └────────┘
                                               ┌────────────────┐
                                               │ Grounds Foreman │
                                               └────────────────┘
                                                      ┌───────┐
                                                      │ Crews │
                                                      └───────┘
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Source: Brownsville ISD, 2002.

The Facilities administrator is responsible for managing the district's capital improvement projects, which range from major repairs to the construction of new school campuses. The Maintenance administrator

manages the general maintenance and repairs for the district's facilities and grounds. This encompasses most small building repairs not considered major renovations.

A poorly organized Facilities Department can cause many problems, nearly all of which result in inefficient use of funds and resources. The most significant problem is a lack of overall vision and approach to facilities development and management. An effective facilities program requires balancing needs between new construction, renovations/repairs and general facility upkeep. When these needs are out of balance, funds can easily be wasted. Facility problems often increase demands on custodial staff. The lack of coordination can result in continually spending funds on custodians where a repair is warranted. An efficient organization operates best when custodial staff forward problems to maintenance for repair and when maintenance staff forwards problems to facilities for capital improvements. With organizations operating separately, this communication and the associated opportunities are lost.

Effective facilities organizations typically organize facilities, maintenance and custodial operations under a single point of accountability.

Recommendation 37:

Reorganize Facilities, Maintenance and Custodial Services under the assistant superintendent of Administrative Services.

In a district the size of BISD, facilities, maintenance and custodial organizations should all report to the same administrator so that all related functions can be efficiently organized and managed. A single point of responsibility assigns accountability for all issues related to facilities, from original construction through maintenance and operations. It also provides a point of responsibility to periodically evaluate use of resources.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The area superintendent for Human Resources assists the superintendent in creating a new job description for the assistant superintendent of administrative services to include the new responsibilities.	April 2003
2.	The superintendent assigns the maintenance, facilities and custodial functions to the assistant superintendent of administrative services.	May 2003
3.	The superintendent announces the new reporting structure.	June 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

BISD does not have a comprehensive facilities master plan that can be directly translated into immediate, mid-term and long-term projects.

School districts use a number of planning processes and documents to build and maintain educational facilities that meet the changing needs of a community. A district's facilities master plan is the result of these planning efforts and becomes the district's policy statement for allocating resources and developing alternatives for facility improvement. Facility master plans become increasingly important as a district's enrollment changes and facilities age.

BISD's most recent facilities plan, now six years old, lacks the necessary elements of a comprehensive facilities master plan. Developed in 1995-96, it has supported a 10-year, $100 million bond program. This plan has been altered and updated to respond to changing conditions, but without the benefit of a formal process for changes to the plan. The 1995-96 plan focused the majority of expenditures on new construction projects for schools, including new schools, wing additions and gymnasiums. The 1995-96 plan did not adequately address needs of support facilities, nor did it address the majority of repairs and deferred maintenance needed at existing facilities, as indicated in the 1994 TSPR report.

The district does not have a dedicated facilities planning function, but rather convenes a committee periodically to develop or revise the master plan. In March 2001, it developed a new Facilities Strategic Action Plan that lists projects needed for future growth, facilities needs for instructional support departments, existing facilities upgrades, Americans with Disabilities Act (ADA) compliance, physical education and performing arts facilities needs, utilities management and safety and health compliance issues. While the plan appears to be comprehensive in its description of needs, it lacks budgeting and funding requirements, details regarding certain projects, coordination with demographics and school capacity and specific implementation schedules and timelines. The needs have not been prioritized or balanced against funding sources and the availability of staff to implement the projects. The district is aware of these issues but has not developed a strategy to address them.

BISD documents that show school capacity include a 1997 internal study and a February 1, 2001, study prepared by an independent consultant. The 1997 study was based on reasonable assumptions that take into account special room usage. However, this study has not been updated to account for new schools and changes in room use or classroom additions since the

study was made. The assumptions used in the 2001 study are not described in detail, but appear to be based on gross area of the schools. This method provides an inaccurate basis for facilities expansion decisions. Area per student guidelines are typically used to approximate the size of proposed facilities; for example, 500 elementary school students x 100 Gross Square Feet (GSF) = 50,000 GSF. However, the reverse process is problematic, particularly with older facilities, because special rooms can have a substantial effect on the result. For instance, an old high school may now be used as an elementary school. If that school has a 4,000 GSF auditorium, the capacity calculation would include 40 additional students (4,000 / 100 GSF per student = 40 students).

BISD began using Texas A&M for long-range enrollment projections in the early 1990s. Those projections have not proven accurate on a school level when compared to actual enrollments, although new school construction and boundary changes may account for some inaccuracy since the studies predated the completion of new school construction projects. The Assessment, Research and Evaluation (ARE) Department is indirectly involved in the A&M projections but the primary client is the Facilities Department, which uses the data for facility planning. The limited involvement of the ARE Department in preparations of enrollment projections does not provide for the most knowledgeable BISD staff regarding enrollment projections to be directly involved in the enrollment studies related to facilities planning. The ARE Department has participated in the facility planning committee in the past, but is not doing so at the time of this review.

The district has recently received Americans with Disabilities Act (ADA) studies from consultants for school facilities and support facilities. The reports list potential issues, including those that are not immediate violations of ADA. Many ADA accommodations are not required until a person with a disability needs the space, at which point the space must be made accessible. Using available funds, many school districts have a goal to fix all potential violations and establish full accessibility. Most districts however, elect to meet basic requirements, and wait until comprehensive renovations are undertaken and the facility is brought into full compliance.

Repairs to BISD's existing facilities are being made on an urgency and funds-availability basis. For example, mold and air quality issues have closed two schools, forcing the district to build temporary schools while the existing school buildings are renovated. The district has awarded contracts for the remediation needed, but does not have a process for proactively identifying future facilities problems, such as the presence of mold.

The lack of a well-constituted, comprehensive facilities master plan wastes funds and educates school children in a less than optimum learning environment. A robust facilities master plan is based on verified data, a complete understanding of both facilities conditions and the implications of the educational program. A good master plan includes an accurate inventory of each classroom in a school to determine the capacity of each school, current enrollment projections and assessments of all repairs and renovations necessary for long-tem use of each facility.

Many larger sized districts hire professionals to develop all or parts of the facilities master plan. The use of outside professionals provide districts with the ability to augment staff in areas where the district has limited staff resources and/or provide the district with skills not available within the district.

Recommendation 38:

Conduct a comprehensive facilities analysis and incorporate results into a long-range facilities master plan.

The plan should include specific recommendations for each existing and proposed facility that includes the identification of deferred maintenance needs, documented cost estimates and a timeline to address these recommendations. The plan should also include:

- Accurate computer aided drafting (CAD) plans of all facilities;
- Enrollment and school capacity projections;
- Design and construction standards and specifications;
- Detailed buildings condition assessment;
- An assessment of the educational adequacy of existing schools;
- Life-cycle replacement projections for major building systems;
- A near-term and long-term implementation plan for ADA and accessibility;
- An energy management plan;
- A plan to address potential mold and air quality concerns; and
- Requirements for safety, security and information technology.

The plan should be developed by an outside consultant. Development of the plan should be coordinated with all appropriate district departments and a representation of community leaders. Once the plan has been completed, it should be reviewed and updated annually.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Facilities administrator develops the specifications for a Request for Qualifications for a qualified	April 2003

	Architectural/Engineering firm to develop a comprehensive facilities master plan and obtains the superintendent's approval.	
2.	The Purchasing administrator issues the Request for Qualifications.	May 2003
3.	The Facilities administrator, Purchasing administrator and other Facilities staff selected by the Facilities administrator review and evaluate proposals.	July 2003
4.	The Facilities administrator obtains the superintendent's approval for the top-scoring proposal.	August 2003
5.	The Facilities administrator obtains board approval to enter into a contract with the top-scoring proposer.	September 2003
6.	The Purchasing administrator completes a contract with the selected proposer.	October 2003
7.	The superintendent obtains board approval of a list of community representatives to serve on the team that assists in developing the facility master plan.	October 2003
8.	The facility master plan is developed and the superintendent obtains board approval.	November 2003 - May 2004
9.	The Facilities administrator directs the annual update process.	May 2005 and Ongoing

FISCAL IMPACT

Studies of this type typically cost from $0.12 to $0.18 per GSF. BISD already has much of the data that can minimize the cost of the study. Using the middle of the range - $0.15 per GSF - and a total area of 5,351,443 GSF, the total cost is approximately $802,716.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Conduct a comprehensive facilities analysis and incorporate results into a long-range facilities master plan.	($802,716)	$0	$0	$0	$0

Chapter 5
FACILITIES USE AND MANAGEMENT

B. CONSTRUCTION MANAGEMENT AND CONTRACTING

The Facilities Department administers and manages new construction projects. The department currently manages approximately $117 million of construction projects, jointly funded by the 1997-1998 Bond Program and the district's local maintenance funds. The department consists of a Facilities administrator, a Facilities coordinator, a construction inspector, a secretary and a clerk.

The Facilities administrator is responsible for management of the department and reporting to the interim superintendent. The Facilities administrator is also the primary point of contact with design professionals and construction representatives for construction projects.

The role of the Facilities coordinator is to provide administrative expertise and construction program support that meets the needs of the district relative to renovation and new construction projects, interacting with architects, contractors and central administration for the purpose of approving the percentage of completion and final payments on construction contracts.

The construction inspector oversees construction of the district's capital improvement projects to ensure that procedures and materials comply with plans and specifications.

The secretary and clerk provide general office support to the Facilities administrator, Facilities coordinator and construction inspector.

FINDING

The district does not have sufficient internal staff resources dedicated to facilities planning. The district funded a new position in 2001-02 to assist the Facilities Department in long-term planning work, but due to financial constraints, that position was deleted in the 2002-03 budget before it was filled. The Facilities Department's goal is to eventually establish two internal divisions: a short-term planning and construction division and a long-term planning, building assessments and budget planning division. Establishing the long-term planning function is contingent upon the hiring of a Facilities planner.

A Facilities planner normally fills multiple roles in supporting a proactive approach to addressing a district's facilities issues. These roles include:

- identifying mid-range and long-range facilities projects;
- developing master schedules and implementation strategies;
- compiling projects and budgets for annual budget exercises;
- maintaining facilities databases;
- serving as point of contact for specialty consultants such as ADA, safety and demographics; and
- producing updates to facilities master plan.

As enrollment increases, the number of facilities increase and buildings age, and facilities planning becomes more important in order to keep the school administration in a proactive position of facilities management. Without a dedicated facilities planning function, the mid- and long-range facility needs lack focus and consistency. Focus and consistency is established when the planning function establishes procedures, policies, baseline data sets and communications protocols for all facilities related issues. For a proactive district the size of BISD, this is a permanent function that address the needs of various stakeholders, including board members, district administrators, city planners and the general public.

School districts with a large number of schools usually establish staff positions for all, or nearly all, required facilities planning functions. These districts occasionally contract with professional firms to provide special expertise for specific functions.

Recommendation 39:

Create a Facilities planner position responsible for long-term planning, building assessments and budget planning.

To become proactive with respect to facilities issues, the district should hire a Facilities planner to coordinate all facilities planning functions. The facility planner should be hired and on the job before a future master facility plan is prepared.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Facilities administrator prepares and submits an organizational structure that includes a facilities planner position to the superintendent for approval.	April 2003
2.	The Facilities administrator in conjunction with the assistant superintendent for Human Resources prepares a job description for a facility planner position.	May 2003
3.	The area superintendent for Human Resources advertises for the Facility planner position.	June 2003

| 4. | The Facilities administrator interviews and recommends the top candidate to the superintendent for approval. | August 2003 |
| 5. | The Facilities planner begins work in the district. | September 2003 |

FISCAL IMPACT

Adding the position of Facilities planner will cost BISD $70,683 per year. These costs are calculated by assuming a mid-level pay grade salary of $60,000 for 226 days per year and adding annual benefits ([$60,000) x 1.12 variable benefits] +$3,483 fixed benefits = $70,683).

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Create a Facilities planner position responsible for long-term planning, building assessments and budget planning.	($70,683)	($70,683)	($70,683)	($70,683)	($70,683)

FINDING

The district does not have a structured construction management and monitoring process. BISD's current construction management processes have several weaknesses, nearly all of which are related to establishing standards, policies and procedures.

The lack of comprehensive educational specifications does not allow the district to translate the district's adopted teaching mission into facility requirements that can help guide Architectural/Engineering design teams. Educational specifications for a typical elementary school are usually a couple of hundred pages long, whereas those developed for Elementary School #139, the design of which was recently completed, run just four pages long.

BISD also lacks a comprehensive set of design and construction standards that express district preferences for materials and equipment to help control design decisions. These standards also help ensure equity between similar construction projects and, even more importantly, reduce future maintenance costs by standardizing parts requirements and repair procedures.

BISD's design approval process is not formalized and is conducted sporadically. New construction projects provide an opportunity for school

districts to build a facility that will serve its needs for many years. School designs are typically reviewed at the completion of the schematic design stage, the design development stage and at the 50 percent, 75 percent and 95 percent completion of construction documents. Each review focuses on a progression of more detailed design issues. As a general rule, the earlier design flaws are identified, the easier and less expensive it is to correct them. It is important to structure the review process and involve appropriate stakeholders at appropriate times. The lack of an adequate review process has contributed to the use of contingency funds for items that should have been included in the design documentation such as electrical outlets, fire alarm and sidewalks.

BISD does not currently use any automated systems to manage or report project progress. Typically, automated systems have three primary functions. They provide information to the district that allows it to understand progress on a project-by-project level, allows the district to verify payment requests and assist the Finance Department with cash flow management and provides summary and detail reporting to district leadership and the public. When automated construction management systems are implemented and maintained by trained construction management professionals, construction problems can be detected and anticipated for proactive problem resolution. Automated construction management systems are considered industry standard nationwide.

Recommendation 40:

Develop a structured construction management and monitoring process.

BISD should establish a structured construction management process that includes standards, policies and procedures, and a monitoring system to prepare BISD to successfully complete existing projects and execute future projects. The aging of current facilities combined with enrollment growth will require BISD to respond with additional facilities projects.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Facilities administrator establishes a comprehensive and prioritized list of construction management standards, policies and procedures that need to be developed.	April 2003
2.	The Facilities administrator makes assignments to Facilities Department staff for the development of draft standards, policies and procedures.	May 2003
3.	The Facilities administrator develops a monitoring process for construction projects and staff develop draft standards.	June 2003 - August 2003

	policies and procedures.	
4.	The Facilities administrator reviews and approves the standards, polices and procedures developed by staff.	September 2003
5.	The Facilities administrator implements the construction management standards, procedures and processes, and monitoring system.	October 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

BISD's process for awarding design contracts is not clear and in some cases the process for selecting the design firms is not consistently applied.

The district does not have or use a clear, documented process for awarding Architectural/Engineering contracts. BISD typically issues a Request for Qualifications (RFQ) for each project. The submissions are evaluated using a scoring system that, while seemingly standard, in practice is not consistently used. Scoring of qualification submissions varies between a 1-5 scale and a 1-10 scale. In some cases, scoring is done by a committee using a single scoring sheet for each submission; in other cases, individual members complete their own scoring sheet, with all scores averaged to determine a final score. This last method can create problems when using certain criteria, such as the location of a firm, which can generate markedly different scores from team members.

BISD uses the location of the firm as an evaluation factor and usually assigns it about 10 percent of the score. When using the location as an evaluation factor without specific guidelines for its weight in the scoring process, firms can receive different scores across different projects and can eliminate highly qualified firms from outside Brownsville and the Valley area. While both Houston and Dallas are home to nationally recognized school design firms, firms from these areas receive the minimum points for this evaluation factor.

The district's scoring system is used to identify a short-list of firms to interview for each BISD project. This list usually numbers five to six firms. Interviews are conducted by ad-hoc groups, which sometimes include board members. Interviews of this type normally last an hour or less and rarely reveal significant information not already included in the qualifications submission.

This evaluation procedure results in projects awarded to firms scoring low on the qualifications submission. Of three projects analyzed, firms ranking 5th, 2nd and 6th were awarded projects over the top ranked firm.

Facilities organizations use standardized and rigorous methods to ensure selection of well-qualified Architectural/Engineering firms. For its current bond program of about 80 projects, Houston ISD used a single RFQ to identify a pool of firms. Over the life of the program, the individual projects were assigned to firms based on project type and firm workload. Other districts use a published scoring method for both qualifications and interviews and publish scores by individual evaluator immediately following each step.

Recommendation 41:

Develop and adopt Architectural/Engineering selection procedures that reinforce selection of the most qualified firms.

BISD should develop, document and publish a formalized procedure for how it awards construction design contracts. The standardized procedure should include a scoring methodology and guidelines for interpreting individual criteria. The procedures should follow national trends that focus on qualifications, expertise and quality of work and design innovation. A committee that is semi-independent of the construction management function should make the selection of design firms to recommend to the Board of Trustees. That group might include members from the:

- Purchasing Department
- Insurance and Safety Department
- Maintenance Department
- Custodial Department
- Finance Department
- Curriculum and Instruction

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Facilities administrator, with approval from the superintendent, establishes a committee for developing procedures for evaluating Architectural/Engineering proposals.	April 2003
2.	The Facilities administrator and committee researches successful qualifications procedures and state approved selection methodologies, then drafts procedures.	May 2003
3.	The Facilities administrator presents the draft procedures to the superintendent for approval.	June 2003

4.	The Facilities administrator presents the procedures to the board for approval.	July 2003
5.	The Facilities administrator implements the procedures and ensures their use during all future evaluations.	August 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

BISD establishes inconsistent and in some cases excessive levels for construction contingencies through the combination of allowances and a "betterment fund." Betterment funds are typically established to set aside funding for unforeseen situations that arise during construction and ranges from unexpected rock formations or soil problems that increase foundation costs to owner-initiated changes such as educational program changes. Allowances are normally established to set aside funding for fixtures and equipment where final decisions are not made until close to the actual completion of the project. For example, a district may establish an allowance for laboratory equipment, which allows them to wait until a few months before occupancy and make selections from products on the market at that time.

BISD regularly establishes contingencies that range from 5 percent for new construction of simple projects to over 15 percent for complicated renovation projects. BISD has used the combination of allowances and a betterment fund to create excessive contingencies. As an example, the Phase II elementary gym project included $62,500 for allowances and the betterment fund. The resulting contingency totaled about 5.9 percent and that amount was not warranted because the project itself was comparatively simple, the same design had already been used by BISD several times and the allowances for plumbing of $10,000, electrical of $5,000 and air conditioning of $10,000 should not be required with a fully developed design.

Contingency funds for the Phase II elementary gym were spent on items such as lowering basketball goals, adding suspended ceilings to coaches' offices, adding accessibility ramps and relocating covered walkways. All of these issues are typically included in design documentation and in the original bid documents. The use of contingency funds for design omissions typically is more costly since change orders to construction contracts after work has began are not competitively bid and have to be negotiated with the construction contractor.

Another problem with BISD's treatment of contingencies is the practice of including contingencies in the construction contract. Including contingencies in construction contracts creates the anticipation that contingency funds will be spent on the project, regardless of actual need. A review of BISD projects indicates that the majority, if not all, of the contingency funds are ultimately spent on the project.

BISD contingency use creates budget problems: designs are not fully developed in many cases, causing contingencies to be overstated; items that should be included in design packages, and therefore part of competitive bidding, are deferred to the change-order process, which is negotiated with the contractor and not subject to competition; since contingencies are part of construction contracts, those funds become a de facto source of money to pay for change orders, which puts the responsibility on the school district to prepare a contract amendment to reduce the contingency.

Effective facility organizations ensure design professionals prepare comprehensive construction documents that minimize the need for unjustified contingencies and allowances. These organizations do include contingency funds in construction contracts. Instead, they manage contingency funds at the program level, which standardizes the use of those funds and also provides a pool of money to address priority needs of other facility projects when all funds are not spent. El Paso ISD has implemented control methods that have resulted in an overall contingency-use rate of 1.2 percent.

Recommendation 42:

Establish appropriate construction contingency levels and manage contingency funds outside of construction contracts.

BISD should establish guidelines for project contingency levels and document the types of changes for which contingency funds can be used. BISD should also hold contingencies as part of an authorized spending limit and not include the contingency amount in construction contracts.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Facilities administrator develops guidelines for construction project contingency levels, guidelines for their use and for managing contingencies outside of construction contracts.	April 2003
2.	The Facilities administrator obtains the superintendent's approval for the guidelines.	May 2003
3.	The Facilities administrator implements the guidelines and ensures	June

| | their use on all future projects. | 2003 |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

BISD does not use a checklist to ensure that construction contractor's have required insurance coverage prior to allowing them to begin work on BISD property. The Insurance and Safety Department maintains insurance certificates for vendors and contractors. The Insurance and Safety Department, however, does not have a copy of district requirements for construction contractor insurance to verify that insurance levels are appropriate. There is also no formal process for the Facilities Department to notify the Insurance and Safety Department of a new requirement and, more importantly, to allow the Insurance and Safety Department to provide confirmation that insurance certificates are in place before the contractor begins a project.

Should construction contractors be allowed to begin projects on BISD property without proper insurance, subjects the district to possible unnecessary claims. Claims can range from minor injuries incurred by construction workers to major injuries suffered by students, staff or faculty.

Proactive school districts have a pre-construction protocol to confirm that district liability is minimized. This procedure includes checking to ensure that all insurance policies are current and name the district as an additionally insured party.

Recommendation 43:

Develop a checklist of requirements to be completed before contractors are allowed to begin a project.

The checklist should be completed by the Facilities Department on construction projects prior to allowing a construction contractor to begin work.

IMPLEMENTATION STRATEGIES AND TIMELINE

| 1. | The Facilities administrator develops a checklist for all items that must be verified prior to allowing construction contractors to begin work. | April 2003 |

| 2. | The Facilities administrator implements the checklist for all future projects. | May 2003 |

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 5
FACILITIES USE AND MANAGEMENT

C. MAINTENANCE OPERATIONS

Effective school maintenance requires timely and accurate information to plan and manage daily operations; a comprehensive work order system that ensures quick responses to school needs and also collects information regarding equipment and related cost of repairs; a preventive maintenance process that minimizes downtime, reduces costs and extends equipment life; and a method to monitor service levels and obtain feedback for improvement.

The BISD Maintenance Department is responsible for maintaining all district facilities including grounds. The department has a staff of 165 full-time trades positions. Between 1997-98 through 2002-03, the number of buildings in the district increased by 16 percent, yet over the same time period, the number of Maintenance personnel has not increased. In 1997-98, the Maintenance Department had 168 manual trades positions.

Exhibit 5-7 lists the current maintenance staff and compares BISD staffing to recommended standards established by the Association of Physical Plant Administrators (APPA). APPA is a national organization whose focus is facilities staffing and operations for educational facilities.

Exhibit 5-7
BISD Maintenance Personnel vs. APPA Standards 2001-02

Department	Number of Personnel	APPA Standards	Recommended Staffing	Excess (Deficient)
Grounds	37	*	37	0
Electrical	14	1:380,000 GSF	14	0
Air Conditioning (Including 5 Filter Changers)	20 (Including 5 Filter Changers)	1:450,000 GSF	12	8
Plumbing	14	1:390,000 GSF	14	0
Construction	62	1:200,000 GSF (Carpenters) 1:500,000 GSF (General Maintenance)	27 11 27	(3)

		1:200,000 GSF (Painters)		
Welders	4	*	4	0
Intercom	5	*	5	0
Warehouse	5	*	5	0
Mechanics	4	*	4	0
Total	**165**		**160**	**5**

Source: BISD Maintenance Department and Association of Higher Education Facilities Officers, 2001-02.
*These positions do not have established standards. For this comparison, the actual number of positions was treated as the standard.

FINDING

The Maintenance Department has successfully assigned foremen to individual schools to establish a direct, client-oriented relationship with principals and assistant principals. This approach is being received well by principals and assistant principals, who now have a single point of contact regarding maintenance items at their schools.

Previously, BISD assigned maintenance items to foremen without regard to the specific school involved. Sometimes multiple crews traveled to a school when one crew could have addressed the multiple issues in a single trip. This approach was inherently inefficient. The process was also confusing to school administrators because the foremen were effectively limited to the immediate maintenance issue and had no procedural method for addressing other pending maintenance items at the school.

The client-oriented relationship allows the principals and foremen to develop a service provider/customer relationship. This type of relationship has made communications more efficient as both parties learn to work with each other. Accountability has also increased because the number of parties involved decreased, and it has allowed each foreman to build institutional knowledge of the schools to which they are assigned.

COMMENDATION

By assigning Maintenance foremen to specific schools, a successful service provider/customer relationship has been achieved.

FINDING

BISD does not have a formal system for preventative maintenance that focuses on increasing the performance and extending the useful life of facilities and equipment. The current maintenance process is informal. Preventive maintenance activities are not documented and for the most part are non-existent.

Some preventative maintenance tasks at BISD are regularly scheduled, but they are not consistently monitored. For example, the Facilities Department monitors the filters in the HVAC system for all schools except the high schools, but has no way to track the high school maintenance schedules. The coil cleaning of these systems is done each summer.

The lack of a preventive maintenance program limits department staff to reacting to equipment breakdowns, rather than addressing equipment needs before the equipment actually fails. Without an effective preventive maintenance program, overall maintenance costs are high.

Effective school districts establish formal preventive maintenance programs. Districts base the programs on the size, age and condition of the district's facilities. Older buildings and older equipment such as HVAC equipment require more frequent maintenance. Once a district establishes a program, it schedules maintenance tasks as often as necessary. Such tasks include cleaning and testing air conditioning systems, cleaning plumbing and roof drainage systems, inspecting interior and exterior lighting, performing bleacher maintenance, inspecting and cleaning interior finishes and assessing exterior lighting and finish. Districts budget and evaluate preventive maintenance costs separately to determine the cost effectiveness of each task. Some districts often assign specific staff to perform preventive maintenance on a full-time basis while others assign preventive maintenance work orders to all maintenance staff along with general maintenance work orders.

The lack of a preventive maintenance system ultimately results in increased costs to the district because minor repairs and routine replacement of parts are not done on a timely basis to properly maintain facilities.

San Angelo ISD developed an innovative preventive maintenance program. The district uses a special maintenance crew to visit each school at least once a year to perform preventive maintenance and low-priority work orders. This crew, called the forward maintenance crew, includes personnel with mechanical, electrical, carpentry, painting and plumbing experience. During these visits, the crews address the majority of

preventive maintenance needs and other low priority needs. Principals in San Angelo are pleased with this process.

Recommendation 44:

Develop a preventive maintenance plan to help reduce maintenance costs.

The Maintenance administrator should develop a preventive maintenance program that identifies all preventive maintenance projects needed in the district, provides a detailed schedule by facility and prioritizes needs.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Maintenance administrator develops a request for proposals to implement a preventive maintenance program and obtains the superintendent's approval to solicit proposals.	April 2003
2.	The Purchasing administrator advertises and solicits proposals for developing a preventive maintenance program.	May 2003
3.	The Purchasing administrator, Maintenance administrator and other members of the Maintenance Department selected by the Maintenance administrator evaluate and score proposals received.	June 2003
4.	The Maintenance administrator recommends the highest scoring proposal to the superintendent for approval.	July 2003
5.	The superintendent obtains board approval for the recommended proposal.	August 2003
6.	The Maintenance administrator works with the selected contractor in the development of the preventive maintenance program.	September 2003 - August 2004
7.	The Maintenance administrator implements the preventive maintenance program.	November 2004 and Ongoing

FISCAL IMPACT

To develop a preventive maintenance program, BISD will need to acquire the services of an outside firm. BISD has some of the data needed to implement a preventive maintenance program that will help reduce the cost of implementing the system. The cost to develop the program, including an inventory of all equipment by facility and developing required maintenance schedules would cost approximately $108,000. The

cost is based on using the benchmark for data collection and organization of $1,000 for elementary schools, $1,500 for middle schools, $2,500 for high schools and an additional $2,500 for other faculty. The cost of data collection for the BISD is $72,000. The cost of report development and documentation is about one half the cost of data collection, which is an additional $36,000. The total cost is $108,000 ($72,000 + $36,000).

A conservative estimate for extending the life of just the district's HVAC equipment by one year will provide annual saving of approximately $166,667. This is calculated by taking the HVAC's estimated replacement value of $37.5 million, divided by its 15 year estimated life and spreading the saving over 15 years [($37.5 million / 15) /15]. Additional savings, which are difficult to estimate, will also result from extending the life of other types of building equipment. Savings are estimated to start at the middle of 2004-05 to allow sufficient time to implement the preventive maintenance program, thus the savings for 2004-05 will be $83,334 ($166,667/2).

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Develop a preventive maintenance plan to help reduce maintenance costs.	($108,000)	$0	$0	$0	$0
Savings resulting for implementing a preventive maintenance plan.	$0	$83,334	$166,667	$166,667	$166,667
Total	**($108,000)**	**$83,334**	**$166,667**	**$166,667**	**$166,667**

FINDING

BISD's work order system used by the Maintenance Department is not meeting district needs. The Maintenance Department uses the ACT 1000 work order system for work orders and purchase orders. The system, although functional, is slow, experiences excessive downtime and is in need of a substantial upgrade.

The lack of a reliable, automated system requires the Maintenance Department to process work orders manually. This problem multiplies when considering the importance of prioritizing work orders and the need to purchase materials. While a fully functioning system automates these procedures, the lack of a system requires BISD staff to set aside projects on a routine basis in order to manually address these tasks.

To be effective, maintenance departments need accurate and timely information regarding service levels, workload assignments, labor hours

and costs. Without this information, the maintenance administrator must rely solely on his judgment in evaluating staff performance and responsiveness. This lack of information limits the maintenance administrator's ability to develop documented support for increasing preventive maintenance or addressing deferred maintenance.

United ISD (UISD) implemented an automated work order system that significantly increased productivity. The system assigns work orders by school and allots time to complete specific tasks. One feature of the system is that principals sign work orders upon completion and record the precise time that tasks are completed. In the first three months of implementation, Maintenance Department workers completed 900 work orders, compared to 600 work orders during a previous three-month period. In 2000, UISD reported estimated annual savings of approximately $480,000.

Recommendation 45:

Develop a plan to upgrade the current work order system to track work orders and preventive maintenance needs by facility, frequency and cost.

The Maintenance Department should evaluate the needs use of an automated work order system to effectively track work orders and better manage operations. The system should also be used to track scheduled preventive maintenance information. Training should be provided for four staff members on how to properly use the upgraded system to ensure the district can receive full benefit.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Maintenance administrator reviews the capabilities of the current system and identifies features needed to properly monitor maintenance work in the district.	April 2003
2.	The Maintenance administrator develops a plan for upgrading the current system.	May 2003
3.	The Maintenance administrator identifies hardware, software and staff training needs, determines the plan of action and submits it to the superintendent for approval.	June 2003
4.	The Maintenance administrator and Purchasing administrator prepare proper purchasing documents to upgrade the current work order system.	July 2003
5.	The Purchasing administrator receives necessary purchasing documents for the upgraded system and prepares documents for	August 2003

	a contract.	
6.	The Maintenance administrator directs the upgrade and selects staff to be trained on the upgraded system upon completion of the contract.	September 2003
7.	The Maintenance Department begins using the upgraded work order system.	October 2003

FISCAL IMPACT

The Maintenance Department received a preliminary quote of $65,000 to upgrade the work order system. The district should also anticipate training needs for four people and hardware upgrades costing $15,000. The total cost to upgrade the current work order system, including training and hardware upgrades totals $80,000 ($65,000 + $15,000).

UISD estimated savings of $480,000 per year after implementing their work order system. Although, BISD maintains more than twice as much space as UISD, estimated annual savings for BISD of $240,000 is conservatively estimated at only half of UISD's savings ($480,000/2).

Recommendation	2002-03	2003-04	2004-05	2005-06	2006-07
Develop a plan to upgrade the current work order system to track work orders and preventive maintenance needs by facility, frequency and cost.	($80,000)	$0	$0	$0	$0
Savings resulting from using upgraded work order system.	$0	$240,000	$240,000	$240,000	$240,000
Total	**($80,000)**	**$240,000**	**$240,000**	**$240,000**	**$240,000**

FINDING

The Maintenance Department performs functions that districts typically contract with private contractors to perform. Major HVAC projects and construction of portable buildings are performed by district staff without preparing cost-benefit analyses to determine if the cost would be less if provided by private contractors.

The Maintenance Department has an HVAC crew, including licensed tradesmen that perform nearly all repairs and improvements to HVAC systems. On occasions, the district has used this team to provide whole classroom wings at schools with new HVAC systems. Similarly, the district has carpentry crews that have constructed portable buildings when two schools had to be closed due to air quality problems.

Maintenance personnel at BISD, like most districts, have very little time that is not required to be spent on needed maintenance work. Assigning maintenance staff to perform non-maintenance duties impacts the completion of their normal responsibilities. During the winter of 2000, most of the carpentry crews were assigned to the construction of portable buildings at the expense of not completing other projects and normal work orders.

Most medium and large school districts use outside contracting to their advantage when they need major HVAC system work and to construct portable buildings. For major HVAC projects, decisions are typically made based on the projected workload of HVAC crews. If crews have time that is not required to perform scheduled maintenance, they are assigned to major HVAC projects; otherwise major projects are executed by HVAC contractors. On the other hand, the majority of portable buildings are constructed by private contractors.

Recommendation 46:

Conduct a cost-benefit analysis for outsourcing portable building construction and HVAC projects.

BISD should conduct a cost analysis of the direct and indirect costs of in-house construction of portable buildings and major HVAC projects and compare the results to contracting for these projects. The analysis should address the impacts of dedicating a large portion of district personnel to major projects and the potential value of familiarity as district personnel maintain equipment they installed. This evaluation will help the district establish policy on when projects are executed with in-house staff, versus privately contracted projects.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Facilities administrator, with the superintendent's approval, establishes a working group to conduct a cost-benefit analysis of outsourcing the construction of portable and major HVAC projects.	April 2003
2.	The working group performs the cost-benefit analysis and presents	May -

	the results to the Facilities administrator.	June 2003
3.	The Facilities administrator submits the analysis to the superintendent for approval.	July 2003
4.	The Facilities administrator ensures that the results of the cost-benefit analysis is used before constructing portable building or performing major HVAC projects with district staff.	August 2002

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 5
FACILITIES USE AND MANAGEMENT

D. CUSTODIAL OPERATIONS

Management of BISD's custodial services is shared by the custodial/environmental supervisor and the principals of the schools. The custodial/environmental supervisor reports to the administrator of the Central Warehouse and provides purchasing support, training and evaluation of custodial staff. School principals directly manage custodial staffs at their schools, but have no direct role in their training or evaluation.

FINDING

BISD applies a custodial inspection process to evaluate and improve performance. The methodology is standardized, using questionnaire forms that generate a performance score. The report is distributed to area superintendents and principals. Inspections are performed at least twice a year and have been in place since 1994-95. Inspections are not announced and individual performance has varied from term-to-term at individual schools. Schools are rated against each other annually.

COMMENDATION

Custodial operations uses a standardized scoring mechanism to periodically evaluate custodial operations at individual schools.

FINDING

The reporting structure for custodial operations is confusing and impedes personnel decisions. The custodial/environmental supervisor has the title and much of the responsibilities for custodial services, but does not have complete control over the custodial staff that work in the schools. School principals direct the daily activities of the custodians that are assigned to their respective campuses.

Like most districts, BISD school principals are the primary clients of custodial services. Principals have varying perceptions of the quality of custodial performance, which range from accolades to resignation. The reasons cited that impede better results include lack of control over hiring and firing decisions, poor performance by some staff and a difficult reporting structure. This structure causes difficulty for personnel decisions because neither the custodial/environmental supervisor nor the school principals have complete control over the custodial staff.

Interviews with principals revealed that custodians perform maintenance functions at many schools, generally based on the individual skills of custodians. In practice, if a principal or assistant principal feels that a custodian can perform a maintenance function, they will typically assign that function to the custodian instead of sending a work order to the Maintenance Department.

Since the custodial/environmental supervisor does not have complete control over the custodial staff, inequities in cleanliness at the different schools have resulted. Using this approach has also contributed to overstaffing of custodial positions and a lack of consistent custodial performance.

Many school districts have custodians reporting to a central custodial manager or supervisor, that has authority over all aspects of the custodial operation, with the school principal being the primary customer. This approach supports quality assurance for custodial operations and provides a means to hold custodians more accountable for work performance.

Recommendation 47:

Centralize all custodial services functions under the custodial/environmental supervisor.

While principals are the end clients for custodians, they should not be distracted from their primary mission of directing the educational environment at their schools. Placing complete responsibility on Custodial Operations will bring consistency to the quality of custodial services and create a single point of responsibility and accountability for custodial services.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The custodial/environmental supervisor develops a centralized management approach for custodial services for the superintendent's approval.	April 2003
2.	The superintendent informs all principals of the new centralized management approach for custodial services.	May 2003
3.	The custodial/environmental supervisor meets with all custodial staff members and discusses the new centralized approach for custodial services.	June 2003
4.	The custodial/environmental supervisor implements the new approach.	July 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The number of BISD custodial staff exceeds the industry staffing formula and also exceeds the district's own staffing formula. The district is reviewing its approach for assigning custodial staff, but has not completed the new approach.

The district has a staffing formula that has been in place since the 1980s. The formula provides that custodians to be assigned to facilities based on one custodian for every 17,000 square feet for permanent space or 15,000 square feet of portable space. The industry standard is 19,000 square feet per custodian.

In 2001-02, BISD employed 292 custodians. This total does not include custodians responsible for cafeterias, who report to the Food Service Department. **Exhibit 5-8** compares current custodial staffing levels to BISD's staffing formula and to the industry standard.

Exhibit 5-8
BISD Custodial Staffing
2001-02

School	Current Custodians	Total Square Feet less cafeteria space	Portable Area (GSF)	Permanent Custodians Required - BISD Standard (1 per 17,000) GSF)	Portable Custodians Required - BISD Standard (1 per 15,000) GSF)	Total Custodians Required per BISD Standard.	Total Custodians Required per Industry Standard (1 per 19,000) GSF)
Aiken Elementary	5	91,382	35,904	5.4	2.4	7.8	6.7
Benavides Elementary	4	74,921	0	4.4	0.0	4.4	3.9
Burns Elementary	6	83,593	8,832	4.9	0.6	5.5	4.9
Canales Elementary	3	71,543	672	4.2	0.0	4.3	3.8

Castaneda Elementary	4	65,400	0	3.8	0.0	3.8	3.4
Champion Elementary*	-	74,209	-	-	-	-	-
Clearwater Elementary	3	34,795	2,748	2.0	0.2	2.2	2.0
Commack Elementary	6	73,366	0	4.3	0.0	4.3	3.9
Del Castillo Elementary	3	38,323	10,080	2.3	0.7	2.9	2.5
Egly Elementary	5	60,841	4,896	3.6	0.3	3.9	3.5
El Jardin Elementary	7	76,677	10,642	4.5	0.7	5.2	4.6
Gallegos Elementary*	-	74,209	-	-	-	-	-
Garden Park Elementary	5	68,824	0	4.0	0.0	4.0	3.6
Garza Elementary	4	59,736	3,936	3.5	0.3	3.8	3.4
Gonzalez Elementary	6	77,629	6,720	4.6	0.4	5.0	4.4
Hudson Elementary	5	72,700	7,680	4.3	0.5	4.8	4.2
Longoria Elementary	4	41,412	6,144	2.4	0.4	2.8	2.5
Martin Elementary	5	63,600	3,744	3.7	0.2	4.0	3.5
Morningside Elementary	6	69,916	5,568	4.1	0.4	4.5	4.0
Palm Grove Elementary	5	49,015	2,112	2.9	0.1	3.0	2.7
Paredes Elementary*	-	75,804	-	-	-	-	-
Perez Elementary	4	48,592	2,304	2.9	0.2	3.0	2.7

Putegnat Elementary	4	57,973	1,920	3.4	0.1	3.5	3.2
Resaca Elementary	3	27,043	7,680	1.6	0.5	2.1	1.8
Russell Elementary	5	66,036	4,912	3.9	0.3	4.2	3.7
Sharp Elementary	3	36,196	7,172	2.1	0.5	2.6	2.3
Skinner Elementary	4	45,847	7,488	2.7	0.5	3.2	2.8
Southmost Elementary	5	63,117	1,536	3.7	0.1	3.8	3.4
Vermillion Elementary	6	74,528	1,344	4.4	0.1	4.5	4.0
Victoria Heights Elementary	3	41,691	9,120	2.5	0.6	3.1	2.7
Villa Nueva Elementary	3	28,114	8,664	1.7	0.6	2.2	1.9
Yturria Elementary	4	57,921	1,632	3.4	0.1	3.5	3.1
Besterio Middle School	9	147,879	34,464	8.7	2.3	11.0	9.6
Central Middle School	8	136,633	6,720	8.0	0.4	8.5	7.5
Cummings Middle School	7	88,796	7,392	5.2	0.5	5.7	5.1
Faulk Middle School	6	94,646	4,704	5.6	0.3	5.9	5.2
Garcia Middle School*	-	114,927	-	-	-	-	-
Lucio Middle	8	113,311	768	6.7	0.1	6.7	6.0

School							
Oliveira Middle School	7	121,116	3,552	7.1	0.2	7.4	6.6
Perkins Middle School	10	134,577	1,344	7.9	0.1	8.0	7.2
Stell Middle School	6	97,232	9,792	5.7	0.7	6.4	5.6
Vela Middle School	8	125,498	5,952	7.4	0.4	7.8	6.9
Hanna High School	21	307,675	32,256	18.1	2.2	20.2	17.9
Lopez High School	19	296,891	0	17.5	0.0	17.5	15.6
Pace High School	21	186,283	15,360	11.0	1.0	12.0	10.6
Porter High School	14	208,243	25,056	12.2	1.7	13.9	12.3
Rivera High School	18	307,961	0	18.1	0.0	18.1	16.2
Total	**292**	**4,426,621**	**310,810**	**240**	**21**	**261**	**231**

Source: BISD Custodial/Environmental supervisor and Facilities Department, September 2002.
Note*: Recently opened schools where custodial staffing was not available.

Staffing levels are determined by GSF area and the rule lacks flexibility; that is, 44,999 SF of permanent area equals two custodians and 45,000 of permanent area equates to three custodians. There is no sharing between campuses and there is no factor for the number of students; after rezoning middle schools, a school that went from 1,100 students to 850 has the same staff.

BISD is overstaffed by 31 positions, by its own standards, and by 61 positions according to the industry of square feet per custodian. Overstaffing custodial positions costs BISD funds that could otherwise be allocated to other needs.

Recommendation 48:

Apply custodial staffing formulas to staff schools and other facilities with the appropriate number of custodians.

The district should use its own staffing standards to reduce custodial staff.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent immediately freezes hiring for custodial positions to reduce the number of employees that may have to be terminated.	April 2003
2.	The custodial/environmental supervisor identifies custodial positions that should be eliminated using the district's custodial staffing formula.	April 2003
3.	The custodial/environmental supervisor and personnel administrator develop custodial staffing formulas for BISD's schools and other facilities.	April 2003
4.	The area superintendent for Human Resources and the custodial/environmental supervisor develop a reduction-in-force plan to address the overstaffing.	May 2003
5.	The area superintendent for Human Resources submits this plan to the superintendent for approval.	May 2003
6.	The superintendent approves the plan and submits the plan to the board for approval.	June 2003
7.	The custodial/environmental supervisor and the area superintendent for Human Resources implement the plan.	August 2003

FISCAL IMPACT

The district exceeds its custodial staffing formula by 31 positions. Eliminating the 31 positions from the custodial staff will save BISD $610,762 per year. These costs are calculated by assuming an average hourly rate of $7.87 for 8 hours at 230 days per year ($7.87 x 8 x 230 = $14,481 per position). Annual benefits amount to $5,221 per position [($7.87 x 8 x 230) x .12 variable benefits] + $3,483 fixed benefits) for a total of $19,702 per position ($14,481 + $5,221). Total savings are achieved through 31 positions at $19,702 per position ($19,702 x 31 = $610,762).

The cost savings estimated do not include the custodians from the four new schools or the ones who staff the central administration building.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Apply custodial staffing formulas to staff schools and other facilities with the appropriate number of custodians.	$610,762	$610,762	$610,762	$610,762	$610,762

Chapter 5
FACILITIES USE AND MANAGEMENT

E. ENERGY MANAGEMENT

BISD does not have an Energy-Management Department, but does have an individual within the Maintenance Department responsible for tracking energy consumption. In July 2000, an Energy Efficient Partnership Report was prepared for BISD by Texas Energy Engineering Services, Inc. (TEESI) under contract to the State Energy Conservation Office (SECO). The findings of the report generally concluded that BISD compared favorably with other districts in terms of the Energy Use Index (EUI), which is measured in British Thermal Units (BTU), and the Energy Cost Index (ECI), which is measured cost per square foot per year, or EUI. These measurements are summarized in **Exhibit 5-9**.

Exhibit 5-9
BISD Energy Use as compared to Peer Districts

User	Total EUI	Total ECI
Brownsville ISD	49,375 BTU/sf/yr	$1.06/sf/yr
Range for Districts in Region	37,826 - 54,367 BTU/sf/yr	$0.95 $1.28/sf/yr

Source: Energy Assistance Partnership Technical Assistance Report, July 2000.

The report also provided detailed recommendations of equipment and procedures to implement, which serves as the basis for an energy management plan and an estimate of the amount of time it will take to recoup money spent on energy efficient equipment through lower energy costs.

FINDING

BISD has not acted on recommendations of the SECO report, particularly those projects related to HVAC and lighting retrofits. The majority of BISD energy costs are the result of temperature control and lighting. As these systems have aged, they have lost efficiency and become obsolete compared to new equipment. BISD does not have any current initiatives to systematically replace this equipment. In the fall of 2001, BISD issued a request for proposals for performance contracting to replace HVAC equipment. Using this type of contracting includes energy savings guarantees from the contractor. In early 2002, the approach was presented to the BISD board; however, the board chose not to support the approach at that time.

The district is reasonably controlling energy consumption and cost. However, the SECO report recommended a number of measures that would further improve these indices, including HVAC upgrades and use of energy efficient lighting fixtures. The SECO report documents opportunities for energy savings by identifying projects at 13 BISD schools. These opportunities are shown in **Exhibit 5-10**.

Exhibit 5-10
BISD SECO Report Findings

School	Total Project Cost	Projected Annual Savings	Payback (Years)
Burns Elementary School	$294,600	$32,400	9
Canales Elementary School	$198,000	$19,900	10
Central Middle School	$143,400	$18,500	8
Del Castillo Elementary School	$78,100	$10,500	7
Egly Elementary School	$39,100	$7,200	5
El Jardin Elementary School	$37,500	$3,600	10
Garden Park Elementary School	$157,500	$19,400	8
Lopez High School	$242,000	$61,500	4
Lucio Middle School	$333,100	$48,600	7
Perez Park Elementary School	$136,900	$13,100	10
Perkins Middle School	$331,200	$42,100	8
Porter High School	$370,500	$38,100	10
Stell Middle School	$168,700	$22,300	8
Total	**$2,530,600**	**$337,200**	**8**

Source: Energy Assistance Partnership Technical Assistance Report, July 2000.

BISD has not taken the opportunity to upgrade these major building systems and to realize the associated utility savings. As shown in **Exhibit 5-10**, the payback on individual projects ranges from four to 10 years, while across all projects the payback period is eight years. These systems last a minimum of 15 years, meaning that energy savings will easily offset the investment in the equipment.

In order to fund these types of investments, many Texas school districts have taken advantage of the Texas LoanSTAR Saving Taxes and Resources Program administered by SECO. Energy efficiency retrofit projects can be financed through this program at very low interest rates. The program provides another benefit by not requiring districts to begin payback of loans until projects are completed and savings are being realized.

Recommendation 49:

Consider using the recommendations included in the State Energy Conservation Office report.

The report serves as the basis for an energy use management plan. The LoanSTAR program provides a convenient source of funding for the retrofit projects. BISD should contact SECO and begin the process to secure LoanSTAR funding.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The energy manager presents energy savings projects included in the SECO report to the board.	April 2003
2.	The board adopts energy savings related projects, to be funded through the LoanSTAR program.	May 2003
3.	The energy manager develops and advertises a request for proposals for energy related retrofit projects.	July 2003
4.	The board approves contracts for energy related retrofit projects.	August 2003
5.	The energy manager implements energy related retrofit projects.	September 2003 - August 2004

FISCAL IMPACT

Implementing the projects through the LoanSTAR program replaces a one-time capital expenditure of $2,530,600 with annual payments of $296,664. These payments are based on a 10-year loan period and 3 percent annual interest. The offsetting savings are estimated at $337,200. Since LoanSTAR does not require repayment until projects are complete, payments and savings begin 2004-05.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Consider using the	$0	($296,664)	($296,664)	($296,664)	($296,664)

recommendations included in the State Energy Conservation Office report.					
Energy savings realized.	$0	$337,200	$337,200	$337,200	$337,200
Total	**$0**	**$40,536**	**$40,536**	**$40,536**	**$40,536**

Chapter 6
ASSET AND RISK MANAGEMENT

This chapter reviews the asset and risk management functions of Brownsville Independent School District (BISD) in the following sections:

A. Cash Management
B. Risk Management
C. Fixed Asset Management
D. Bond Issuance and Indebtedness

Effective asset and risk management:

- provides the district with investments that earn the maximum interest rate available while safeguarding funds and ensuring liquidity to meet the fluctuating cash flow requirements of the district;
- controls costs by ensuring that the district is adequately protected against significant losses with the lowest possible insurance premiums and providing sound and cost-effective health insurance for district employees;
- accounts for district property accurately and safeguards it against theft and obsolescence; and
- ensures the district complies with bond covenants and that outstanding bonds pay the lowest interest rate possible.

BACKGROUND

The organization of the asset and risk management functions varies in Texas school districts. The alignment of the risk management functions within BISD changed several times since August 2001 without significant changes in the structure of the departments responsible for the individual functions. BISD has the asset and risk management functions aligned under an area superintendent and the chief financial officer of the district. **Exhibit 6-1** presents the organization of these functions.

Exhibit 6-1
Asset and Risk Management Functions Organization

2002-03
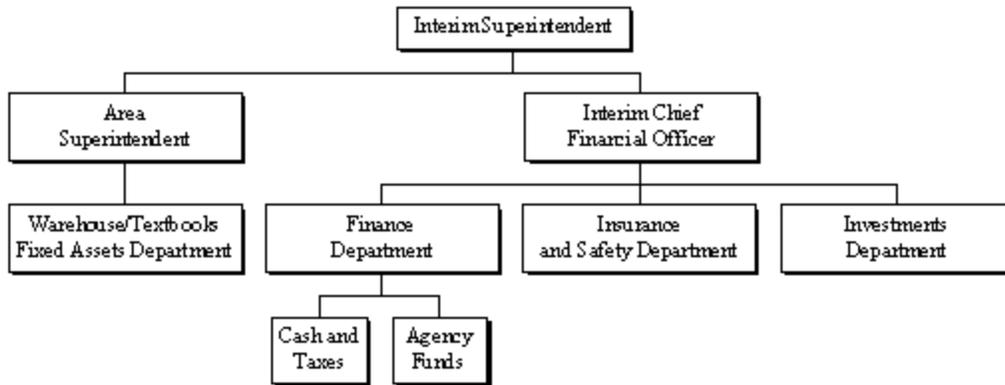
Source: BISD, Insurance and Safety Department, BISD Fall 2002 Organization Chart, Revised, October 2002.

The personnel in the Investments Department and Finance Department perform the cash management functions of the district. The district uses Texas State Bank as the depository bank and has investments in the depository bank, a repurchase agreement and three public funds investment pools. The personnel in the Insurance and Safety Department carry out the risk management functions for BISD. The district is self-insured for both workers' compensation and health insurance and uses providers for liability, property and casualty, flood and windstorm insurance. The Warehouse/Textbooks/Fixed Assets Department staff handles all responsibilities for fixed asset management. BISD has a comprehensive fixed asset listing that includes both fixed assets and other equipment owned by the district. The interim chief financial officer is responsible for oversight of bond issuance and indebtedness for the district. BISD has a number of outstanding bond issues including unlimited tax school building bonds and unlimited tax refunding bonds.

Chapter 6
ASSET AND RISK MANAGEMENT

A. CASH MANAGEMENT (PART 1)

Effective cash management practices ensure that district funds are collected in a timely manner and that they are invested in secure instruments with maximum earning potential. The Federal Deposit Insurance Corporation (FDIC) safeguards cash and investments against the risk of loss by holding cash in protected accounts. For amounts more than the FDIC coverage, the institution should provide a depository bond or pledge securities to the district in an amount equal to or greater than the amount that exceeds FDIC coverage.

The maturity of the investments should match the fluctuating cash flow demands of the district. Effective cash management provides the district with additional revenue to fund essential programs and operations by providing market rates of return on the maximum amount of cash not needed to fund immediate needs.

Texas school districts must comply with the Texas Education Code (TEC), Chapter 45, Subchapter G in the selection of a depository bank. This subchapter states in section 45.202, "the school depository or depositories of every independent school district may be selected only as provided by this subchapter." The subchapter requires the depository bank to be located in Texas and establishes the term of the depository contract at two years, but allows school districts to extend the term of the contract for one two-year period. The subchapter also stipulates the form of the bid and requires the bid notice to be sent to all banks in the school district. BISD bid the depository contract for a two-year period that runs from September 2001 through August 2003 and received bids from four banks. The bid from Texas State Bank was selected as the best bid.

The depository agreement provides all banking services required by BISD at no cost to the district and without a requirement for the district to maintain a set amount of funds in its bank accounts to compensate the bank for services provided. Based on the July 2002 account analysis from Texas State Bank, the district did not have to pay annual bank charges of $5,381 due to the terms of the depository agreement.

The terms of the depository agreement include interest on single maturity time deposits above the Treasury Bill (T-Bill) ask rate and interest on all checking accounts at 90 percent of the 13 week T-Bill ask rate adjusted on the first business day of each month. Based on the July 2002 account analysis, the district earned $1,380 on a balance of $1,114,086, which

computes to an annual interest rate of 1.49 percent. The depository agreement also allows the district to borrow funds, if necessary, for up to 90 days at 74 percent of the prime rate as quoted in the Wall Street Journal.

BISD implemented a number of cash management recommendations from the 1994 Texas School Performance Review (TSPR) report. The district implemented the report's recommendations to consolidate the number of bank accounts maintained by the district, ensure that cash balances are invested, obtain on-line capabilities with the depository bank and investment pools and diversify the district's investments. BISD maintains eight bank accounts at Texas State Bank for the day-to-day operations of the district to meet accounting and fund reporting requirements (**Exhibit 6-2**).

Exhibit 6-2
BISD Bank Accounts and Balances
August 31, 2002

Account Name	Account Balance	Average Account Balance for the Month
General Fund	$360,086	$409,433
Special Revenue	$127,973	$94,394
Debt Service	$21,149	$14,033
Capital Projects	$144,939	$421,022
Net Payroll	$198,203	$217,578
Gross Payroll	$140,226	$141,590
Self Funded Workers' Compensation	$19,743	$18,797
Barron Workers' Compensation	$83	$53
Total	**$1,012,402**	**$1,316,900**

Source: BISD, Finance Department, Summary of Texas State Bank Account Balances for August 2002.

The district also maintained an interest bearing checking account for the Aquatic Center. The district closed the account August 2002 and incorporated the Aquatic Center activity funds into the general fund bank account.

The Cash and Taxes accountant reconciles the district's checking accounts and receives assistance from a clerk. BISD receives the bank statement for each account from the depository bank on a CD ROM disk and obtains a list of paid items through an online system from the bank. The online software compares the list of paid checks to the last outstanding check list and to checks written during the month and generates an outstanding check list to use in the reconciliation process. The clerk prepares the reconciliations for the checking accounts maintained at the depository bank. The accountant reviews the reconciliations and prepares the journal entries necessary to adjust the general ledger, and the general ledger accountant records the entries. The reconciliation for all accounts is completed by the fifteenth to twenty-fifth of the month.

The Cash and Taxes accountant prepares a daily balance log for the checking accounts. This daily balance log spreadsheet summarizes the cash position of the district for each day of the month and calculates an average balance in each account for the month. On average the district maintained $1,174,189 in the checking accounts for 2001-02.

Exhibit 6-3 presents the average balance in the district's accounts for the 12 months ending on August 31, 2002.

Exhibit 6-3
Average Balances for BISD Checking Accounts
September 2001 through August 2002

Month	General Fund	Special Revenue	Debt Service	Capital Projects	Net Payroll	Gross Payroll	Self Funded Workers' Comp	Barron Workers' Comp
September-01	$943,089	$80,050	$215	$66,720	$217,447	$141,182	$17,370	$34
October-01	$611,941	$119,391	$212	$46,437	$193,390	$169,378	$17,523	$40
November-01	$784,492	$108,616	$1,581	$19,542	$212,413	$131,717	$21,157	$61
December-01	$502,116	$111,542	$270	$31,663	$97,109	$136,487	$18,181	$42
January-02	$463,632	$102,822	$2,481	$64,055	$160,270	$208,296	$16,726	$45
February-02	$425,864	$84,471	$928	$33,967	$184,497	$177,715	$17,294	$43
March-02	$429,091	$95,290	$2,317	$271,701	$282,494	$144,063	$16,929	$56
April-02	$430,350	$139,564	$2,623	$8,685	$219,152	$200,596	$18,796	$45
May-02	$309,711	$116,447	$104	$246,740	$297,068	$145,160	$19,654	$37
June-02	$373,083	$96,862	$122	$385,416	$319,199	$138,759	$114,232	$39

July-02	$381,998	$104,916	$12,261	$276,240	$238,133	$171,012	$19,860	$48
August-02	$409,433	$94,394	$14,033	$421,022	$217,578	$141,590	$18,797	$53
Average	**$505,400**	**$104,530**	**$3,096**	**$156,016**	**$219,896**	**$158,830**	**$26,377**	**$45**

Source: BISD, Finance Department, Summary of Texas State Bank Account Balances, September 2001 through August 2002

The daily balance log provides the district with information on the existing cash position of the district and assists the district in cash management. The administrator for Investments uses the daily balance log to determine the amount of funds available to invest and the amount of funds needed to cover scheduled payments on a daily basis. The administrator bases the cash balance left in the checking accounts on an historical analysis of the amount of checks that clear the bank daily. Cash is moved daily, if necessary, among the checking accounts and the investment pool accounts. All payments from the State of Texas are deposited directly into an investment pool, and tax receipts are deposited into the general fund and debt service fund checking accounts daily. The administrator for Investments uses weekly reports from accounts payable that detail the amount of payments being processed from each fund to determine the amount to be transferred to the checking account used by the fund.

Reports from the Payroll Department help determine the amount of funds necessary to fund the net payroll. The amount to cover direct deposits into employee accounts and a portion of the remaining payroll are transferred to the payroll account on the day of the payroll, and the remainder of the payroll is funded over several days. The amount funded on each subsequent day is based on historical check clearing patterns for the payroll account. This allows the cash to remain invested as long as possible without an overdraft on the payroll account occurring. The related Teacher Retirement System (TRS) contributions, Social Security, Medicare and Federal withholding are funded on the date of the wire transfers to their respective recipients.

BISD has diversified its investments between three types of investments with differing maturities. BISD invests excess funds in certificates of deposit, investment pools and a repurchase agreement. In February 2000, BISD entered into a master repurchase agreement with Bayerische Hypo- und Vereinsbank AG, New York Branch (BHV) for bond proceeds with a maximum investment of $35 million with a final repurchase date of March 31, 2003. A repurchase agreement is the purchase of a security with an agreement to repurchase that security at a specific price and date. Repurchase agreements may be used to earn income on idle cash at or near the federal funds market rate. A holder of securities sells them to an

investor with a repurchase agreement. The buyer is in effect lending the seller money for the period of the agreement. The repurchase agreement is fully collateralized and is an authorized investment under the Public Funds Investment Act, Chapter 2256 of the Texas Government Code (TGC). The remainder of BISD investments have maturity dates of three months or less.

Diversification reduces market and credit risk by putting various types of securities with different maturities into an investment portfolio. In this manner, a specific event, such as the decline in value

of one security, will have less effect on the district's total portfolio than if the district had all its money in a single security. Diversification follows the adage of not putting all of one's eggs in one basket. Diversification, or investing in different types of instruments with different maturity dates, spreads out the maturity, liquidity, credit and market risk for the district. Various investments react differently during changes in rates or different market conditions. BISD investments are diversified between institutions within most of the investment portfolios. **Exhibit 6-4** presents the financial institution, type, interest rate and amount invested by BISD as of August 2002.

Exhibit 6-4
BISD Investments
August 31, 2002

Account	Institution	Type	Interest Rate	Amount Invested
Capital Projects	MBIA - CLASS	Investment Pool	1.71%	$275,202
Capital Projects	MBIA - CLASS	Investment Pool	1.71%	$4,237
Capital Projects	MBIA - CLASS	Investment Pool	1.71%	$7,850,675
Capital Projects	TexPool	Investment Pool	1.87%	$29,658,650
Capital Projects	Lone Star - Liquidity Plus	Investment Pool	1.81%	$667
Capital Projects	Hypo-Vereinsbank	Repurchase Agreement	6.62%	$12,065,551
Capital Projects	Lone Star - Liquidity Plus	Investment Pool	1.81%	$4

Capital Projects	Lone Star - Liquidity Plus	Investment Pool	1.81%	$7,119
	Capital Projects Total			**$49,862,105**
Debt Service	Texas State Bank	Certificate of Deposit	2.30%	$2,000,000
Debt Service	Lone Star - Liquidity Plus	Investment Pool	1.81%	$25,130
Debt Service	MBIA - CLASS	Investment Pool	1.71%	$3,126,580
	Debt Service Total			**$5,151,710**
General Fund	Texas State Bank	Certificate of Deposit	2.30%	$5,000,000
General Fund	Texas State Bank	Certificate of Deposit	2.30%	$20,000,000
General Fund	Texas State Bank	Certificate of Deposit	2.30%	$5,000,000
General Fund	Texas State Bank	Certificate of Deposit	2.30%	$7,000,000
General Fund	Lone Star - Liquidity Plus	Investment Pool	1.81%	$1,029,552
General Fund	Lone Star - Enhanced Corporate	Investment Pool	6.00%	$21,242,039
General Fund	MBIA - CLASS	Investment Pool	1.71%	$3,904,349
General Fund	TexPool	Investment Pool	1.87%	$2,250,984
	General Fund Total			**$65,426,924**
Gross Payroll	Lone Star - Liquidity Plus	Investment Pool	1.81%	$3,510,654
Gross Payroll	MBIA - CLASS	Investment Pool	1.71%	$562,424
	Gross Payroll Total			**$4,073,078**
Net Payroll	Lone Star -	Investment Pool	1.81%	$327,010

	Liquidity Plus			
Net Payroll	MBIA - CLASS	Investment Pool	1.71%	$84
	Net Payroll Total			**$327,094**
Special Revenue	Lone Star - Liquidity Plus	Investment Pool	1.81%	$121,607
	Special Revenue Total			**$121,607**
Workers' Comp	Lone Star - Liquidity Plus	Investment Pool	1.81%	$854
Workers' Comp	MBIA - CLASS	Investment Pool	1.71%	$5,929,126
	Workers' Comp Total			**$5,929,980**
Total				**$130,892,498**

Source: BISD, administrator for Investments, August 2002.

The district's investment policies allow district funds to be invested in the following investment types:

- obligations of, or guaranteed by, governmental entities as permitted by TGC 2256.009;
- certificates of deposit and share certificates as permitted by TGC 2256.010;
- fully collateralized repurchase agreements permitted by TGC 2256.011;
- banker's acceptances as permitted by TGC 2256.012;
- commercial paper as permitted by TGC 2256.013;
- two types of mutual funds as permitted by TGC 2256.014: money market mutual funds and no-load mutual funds;
- a guaranteed investment contract as an investment vehicle for bond proceeds, provided it meets the criteria and eligibility requirements established by TGC 2256.015; and
- public funds investment pools as permitted by TGC 2256.016.

The average interest rate for the investments, which is the total of interest rates divided by the number of accounts, is 2.22 percent. The average weighted interest rate, which is the sum of the investment amount times the related interest rate divided by the total amount of investments, is 3.08 percent. **Exhibit 6-5** summarizes the investments by institution and presents the percent of total investments in each institution.

Exhibit 6-5
BISD Investments by Institution
August 31, 2002

Institution	Amount Invested	Percent of Total
Hypo-Vereinsbank	$12,065,551	9.2%
MBIA	$21,652,677	16.5%
TexPool	$31,909,634	24.4%
Texas State Bank	$39,000,000	29.8%
Lone Star	$26,264,636	20.1%
Total	**$130,892,498**	**100.00%**

Source: BISD, administrator for Investments, August 2002.

BISD investment policies require the performance of the investment portfolios to be measured against investment standards that may include T-Bill interest rates. **Exhibit 6-6** presents the T-Bill rates as of September 3, 2002.

Exhibit 6-6
U. S. Treasury Bill Rates

Term	Interest Rate
1 Month	1.69%
3 Month	1.64%
6 Month	1.62%
1 Year	1.71%
2 Year	2.01%
3 Year	2.36%
5 Year	3.04%

Source: United States Treasury, September 2002.

The average interest rate received by BISD on investments of 2.22 percent exceeds the interest rate paid on two-year T-Bills, and the weighted average interest rate of 3.08 percent exceeds the rate paid on five-year T-Bills and the average of T-Bill rates with maturities of five years or less.

FINDING

BISD does not prepare monthly or annual cash flow forecasts. The 1994 TSPR report recommended preparing intermediate and long-term cash flow forecasts, but the district has not implemented this recommendation. While the district has an exact description of its daily cash position according to daily cash log reports, it has no forecast of its future cash needs.

Texas school districts, including BISD, receive the majority of funds for day-to-day operations from the state and local property tax collections. The major cash outflow for Texas school districts like BISD is payroll and those associated costs, such as health insurance, workers' compensation and other benefits paid by the district. In most districts, payroll expenditures occur evenly throughout the year. Other expenditures vary from month to month.

The Texas Education Agency (TEA) provides school districts with a payment schedule that includes both the timing and amount of payments the district will receive. BISD receives this information from TEA. In addition, BISD has historical tax collection information as well as cash revenue information about special programs and bond issuance and interest funds.

Chapter 6
ASSET AND RISK MANAGEMENT

A. CASH MANAGEMENT (PART 2)

The TEA *Financial Accountability System Resource Guide* (*FASRG*) states, "a cash flow projection report is an important management tool that directs decisions about the maturity of various investment instruments, in accordance with projected uses of cash to liquidate financial obligations. All investments should be made with the school district's cash needs and cash flow forecast in mind." According to TEA, cash flow forecasts provide information to districts about possible shortfalls and surpluses and allow districts to plan accordingly. TEA recommends cash management planning to provide a district with opportunities to maximize earnings and ensure adequate funds are available to meet future cash needs. Without cash flow forecasts, BISD may fail to identify opportunities to maximize earnings and ensure adequate funds are available to meet future cash needs.

Many school districts prepare cash flow forecasts to assist the district in managing cash and investments. Some districts use software programs that are integrated with their financial management software to produce cash flow forecasts, while other districts use spreadsheets to project their cash flow. For example, Hitchcock ISD (HISD) prepares cash flow forecasts at the beginning of each year. The chief financial officer prepares a spreadsheet forecasting cash flow for each month of the year for each major account. The chief financial officer updates the cash forecast monthly by adding actual revenues and expenditures for each month as the year progresses. As a result, the forecast is always current. **Exhibit 6-7** presents an excerpt from HISD's cash flow forecast.

Exhibit 6-7
Abstract of HISD Cash Flow Schedule

Month	State Aid	Taxes	Other In Flows	Total In Flows	Payroll Costs	Operational Costs	Total Out Flows	Monthly Net Flow	Net Cash Position
Aug.	-	-	-	-	-	-	-	-	$2,892,802
Sept.	$711,036	-	$28,500	$739,536	($501,442)	($342,813)	($844,255)	($104,719)	$2,788,083
Oct.	$582,542	$148,480	$23,500	$754,522	($501,442)	($185,022)	($686,464)	$68,058	$2,856,141
Nov.	$306,940	$214,823	$22,500	$544,263	($501,442)	($254,712)	($756,154)	($211,891)	$2,644,250

Source: HISD, Business Office, September 2002.

Many districts use monthly and annual cash flow forecasts to determine the amount of cash necessary to meet future cash needs. These forecasts identify potential cash shortfalls or excesses and allow the district to plan accordingly. If cash shortfalls are forecast these districts may need to borrow funds to cover the shortfall and are accordingly prepared for the situation. If excess cash is available, these districts invest the excess cash in investments and calculate maturation dates in accordance with projected times when the cash will be needed. This effectively maximizes their interest earnings. These districts estimate the amount and timing of cash inflows and use historical tax collection data based on predictable patterns, special program revenues based on expenditure of funds and bond proceeds based on issuance, monthly interest and remaining bond monies to determine cash flow forecasts for their districts.

Many districts also prepare cash flow forecasts for each type of account or fund due to the legal requirements for segregation of cash imposed on bond funds, special revenue funds, debt service funds and general operating funds. Many districts submit the forecasts to the Board of Trustees as a part of the monthly financial reports prepared by the district.

Recommendation 50:

Prepare monthly and annual cash flow forecasts.

The administrator for Investments should prepare the monthly and annual cash flow forecasts for the major funds of the district. The forecasts should be updated monthly based on actual inflows and outflows in each of the major funds.

The administrator for Investments should use the cash flow forecasts to determine the type and maturity of investments for the district. This will allow the district to maximize interest earnings in each of the funds.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent directs the chief financial officer and administrator for Investments to prepare monthly and annual cash flow forecasts for presentation to the board.	March 2003
2.	The chief financial officer and administrator for Investments develop a cash flow forecast format and present it to the superintendent for review and approval.	April 2003
3.	The administrator for Investments prepares a monthly and annual cash flow forecast for each major fund of the district and submits them to the chief financial officer for review and approval.	May 2003 and Ongoing Monthly

4.	The chief financial officer reviews and approves the cash flow forecasts and submits them to the superintendent for inclusion in the monthly board meeting agenda item for financial reports.	May 2003 and Ongoing Monthly
5.	The administrator for Investments uses the cash flow forecast to determine the maturity of investments for each major fund of the district.	May 2003 and Ongoing Monthly

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

BISD is not in compliance with one provision of the Public Funds Investment Act (PFIA) that governs the investment of governmental funds and does not designate responsibility ensuring PFIA compliance. The interim chief financial officer has completed all required investment training which includes PFIA responsibilities for designated investment officers; however, the previous chief financial officer for the district had not met these training requirements and was unaware that the district was not compliant with all PFIA requirements. The job descriptions for the chief financial officer, administrator for Investments and the administrator for Budget, the district's three designated investment officers, do not contain language assuring compliance with the PFIA as a job-related responsibility.

The district's investment policies mirror the PFIA including numerous compliance issues. **Exhibit 6-8** presents the major areas of compliance outlined in board policy CDA (Legal).

Exhibit 6-8
PFIA Compliance Requirements

PFIA Requirement	BISD Meets Requirement
Investment policy requirements	Yes
Investment strategy approval	Yes
Annual review of policy and strategy	Yes
Designated investment officer	Yes
Investment policy presented to companies	Yes
Annual compliance audit	Yes

Training requirements	No
Investment reports	Yes

Source: BISD, board policy CDA (Legal).

TGC 2256.008 requires that within 12 months after taking office or assuming duties, the treasurer or chief financial officer and the investment officer of the district shall attend at least one training sessionfrom an independent source approved either by the board or by a designated investment committee advising the investment officer, as provided for in the district's investment policy. This initial training must contain at least 10 hours of instructionrelating to their respective responsibilities under the PFIA. The previous chief financial officer, one of the district's three investment officers and appointed as an investment officer on September 18, 2001, did not complete the required investment training within one year of appointment.

Based on TGC 2256.005, BISD board policy CDA (Legal) states the following:

> "A written copy of the investment policy shall be presented to any person offering to engage in an investment transaction with an investing entityor to an investment management firm under contract with an investing entity to invest or manage the entity's investment portfolio. For purposes of this policy, a business organization includes investment poolsand an investment management firm under contract with an investing entity to invest or manage the entity's investment portfolio.The qualified representative of the business organization offering to engage in an investment transaction with the District shall execute a written instrument in a form acceptable to the District and the business organization substantially to the effect that the business organizatio n has:
>
> - Received and thoroughly reviewed the District investment policy; and
> - Has acknowledged that the business organization has implemented reasonable procedures and controls in an effort to preclude investment transactions conducted between the District and the organization that are not authorized by the District's policy, except to the extent that this authorization is dependent on an analysis of the makeup of the

entity's entire portfolio or requires an interpretation of subjective investment standards.

The investment officer may not acquire or otherwise obtain any authorized investment described in the District's investment policy from a person who has not delivered to the District the instrument described above."

Although the district has written evidence that the investment policy was given to and reviewed by the entities with which the district invests funds at the time the investment accounts were opened, the district does not have written evidence that the most recent revision of the investment policy was given to these investment entities. Board policy CDA (Legal) was last revised on November 12, 2001 and board policy CDA (Local) was last revised on May 14, 2001. Only TexPool has returned a statement that reflects having received and reviewed the revised investment policies. The statements from MBIA, Lone Star and Bayerische Hypo-und Vereinsbank AG are dated before the last revision date.

Many districts have designated the responsibility for compliance with the PFIA as part of the job description for the cash management function. The responsibility for compliance includes ensuring the district's investment officer has received the appropriate training in addition to the other requirements of the PFIA. Some districts require a statement from investment companies that reflects the company has received and reviewed the investment policies of the district each time the district revises the policies. These districts are assured that the investment companies have implemented reasonable procedures and controls in an effort to preclude investment transactions that are not authorized by the district's policy. Districts that assign responsibility and hold the position accountable through the evaluation process ensure continual compliance with the PFIA.

Recommendation 51:

Ensure compliance with the Public Funds Investment Act and related training by designating responsibility in a position's job description.

The job description for the administrator for Investments should include ensuring compliance with the PFIA.

The administrator for Investments should develop procedures to ensure the district complies with all requirements of the PFIA and should ensure that appropriate staff complete required training. These procedures may include a checklist that includes obtaining acknowledgement from investment companies of the district's investment policy for new

investment firms, obtaining acknowledgement each time the policy is updated and attending required investment seminars.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer revises the job description for the administrator of Investments to include responsibility for compliance with the PFIA and submits it to the superintendent for review and approval.	March 2003
2.	The superintendent presents the revised job description to the board for review and approval.	April 2003
3.	The chief financial officer includes this responsibility in the evaluation of the administrator for Investments.	May 2003 and Annually
4.	The administrator for Investments ensures compliance with the PFIA by developing procedures to address all requirements of the PFIA.	Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

BISD does not have adequate internal controls in place over activity funds. The district maintains 50 separate bank and savings accounts for activity funds at the schools and the Transportation Department. One school has a CD at a credit union. The accounts are at various banks and may or may not earn interest. The 1994 TSPR report stated that the 1992-93 internal audit report for activity funds found several irregularities and examples of poor judgment in the use of activity funds. The report also found that BISD did not have adequate internal controls over the activity funds. The 1994 TSPR report recommended employees who clearly violated board policy, grossly mismanaged or fraudulently spent activity funds be terminated.

The activity fund accounts generate a significant amount of revenue during each year and have substantial balances remaining at the end of each year. Various student groups at the schools generate revenue through fundraising activities and donations. The accounts at the schools do not include booster club accounts. The faculty and staff have accounts in the activity funds, and the funds are normally generated through donations from the faculty and staff or through proceeds from vending machines.

Exhibit 6-9 presents a summary of the district's activity funds for a three-year period.

Exhibit 6-9
BISD Summary Activity Fund Information
1998-99 through 2000-01

Year	Beginning Balance	Additions	Deductions	Ending Balance
1998-99	$570,963	$3,077,912	$3,046,553	$602,322
1999-2000	$602,322	$3,238,265	$3,124,527	$716,060
2000-01	$716,060	$3,509,739	$3,436,171	$789,628

Source: BISD, Audited Financial Statements, 1998-99 through 2000-01.

The high school activity funds represent more than 55 percent of the activity in the accounts and more than 60 percent of the balance at the end of the year. The middle school accounts represent approximately 24 percent of the activity in the accounts and more than 18 percent of the balance in the accounts at the end of the year. **Exhibit 6-10** presents the activity fund information based on grade levels. The total activity and ending balances do not match the audited financial statements for 2000-01, because the Internal Audit Department did not include accounts payable that were, however, recognized in the audit.

Exhibit 6-10
BISD Activity Funds by Grade Level

Grade Level	Beginning Balance	Additions	Deductions	Ending Balance
High School	$430,587	$1,942,887	$1,907,720	$465,754
Middle School	$147,356	$833,925	$841,996	$139,285
Elementary School	$138,106	$723,372	$701,183	$160,295
Total	**$716,049**	**$3,500,184**	**$3,450,899**	**$765,334**

Source: BISD, Internal Audit Department, Student Activity/Motivational Funds Audit Report, August 31, 2001.

The administrator for Finance has oversight responsibility for the district's activity funds. The Agency Funds accountant reports to the administrator for Finance and has 10 bookkeepers at the secondary schools responsible

for the day-to-day operations of the activity funds. Each high school has a bookkeeper, and middle schools have one bookkeeper for every two schools. The elementary schools do not have bookkeepers, and the principal's secretary is generally responsible for maintaining the activity fund accounts.

The elementary schools receive assistance from the secondary bookkeepers when necessary. **Exhibit 6-11** presents the organization of this function in BISD's Finance Department.

Exhibit 6-11
Activity Funds Administration
September 2002
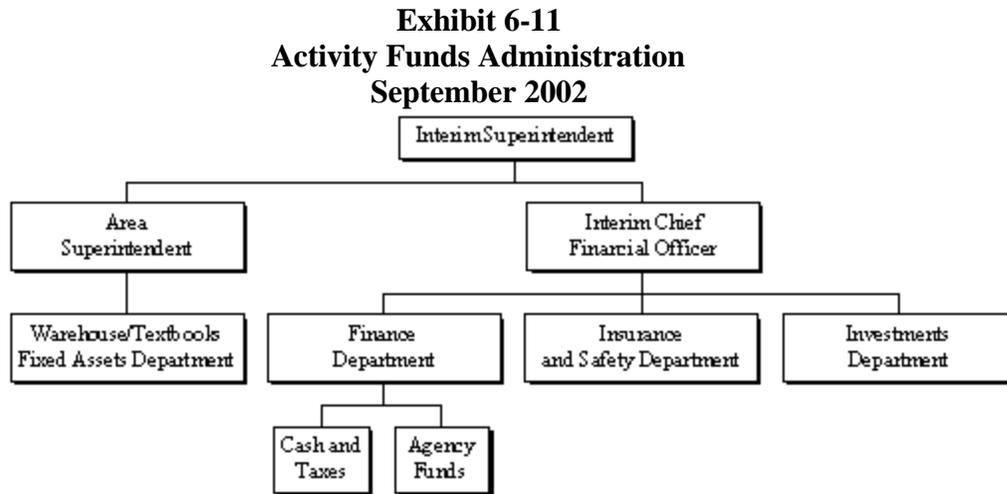
Source: BISD, Finance Department, September 2002.

The Finance Department funds the bookkeepers, who are stationed at the schools. The secondary bookkeepers are responsible for all aspects of the activity funds and submit a trial balance to the agency funds accountant for monthly review. The secondary schools do not submit bank reconciliations to the central office with the trial balances. The elementary schools do not submit any documentation to the Finance Department related to the activity funds. The only documentation submitted by the elementary schools is to the Internal Audit Department in preparation for the annual audit of the activity funds.

The Internal Audit Department audits the activity funds annually using the activity fund manual as the benchmark. BISD has a comprehensive student activity fund manual issued by the Finance Department that was last updated in July 2002. **Exhibit 6-12** presents the most common findings that resulted from the most recent audit available. Findings relevant to only one school are not presented.

Exhibit 6-12
Internal Audit Findings for Activity Funds
August 31, 2001

Finding	Number of Schools With Finding
Secondary Schools	
Fundraising without prior approval	7
Operational expenditures made with activity funds	6
Deposits not made in a timely manner	6
Out of district trips without superintendent approval	5
Elementary Schools	
Fundraising without prior approval	9
Operational expenditures made with activity funds	6
Deposits not made in a timely manner	6
Financial recap section in fundraising applications not completed	5
Payment for expenditures from incorrect fund	3
Checks pre-signed	3
Unable to track money	2
Bank account not properly reconciled	2
Receipts written after deposits made	2
Receipts not issued	2
Contracted services not properly documented	2

Source: BISD, Internal Audit Department, Student Activity/Motivational Funds Audit Report, August 31, 2001.

The secondary schools had four findings that were reported at more than one school. However, one-third or more of the schools had the finding reported. Other internal control weaknesses noted at a single secondary school were the lack of segregation of duties and the lack of documentation for expenditures. Elementary schools had more findings more frequently than the secondary schools. Other internal control weaknesses noted at a single elementary school were the lack of segregation of duties, the lack of documentation for expenditures, improper petty cash documentation and altered receipts. BISD does not have a monthly review of the elementary schools activity funds.

Many school districts centralize activity funds to strengthen internal controls. By centralizing management of all district student activity funds and investing funds in interest-bearing accounts, San Antonio ISD (SAISD) minimized misuse of activity funds, maintained thorough accounting records and generated revenues for schools through interest on the accounts. Accounting for student activity funds in the district was centralized. All funds were deposited into a single checking account for school activity funds and this account was reconciled at the central office. Interest earned on the funds was credited to the account of each school.

Many districts also ensure that activity funds are reviewed on a monthly basis to strengthen internal controls and ensure that cash and investment duties are segregated and that expenditures are accurately documented. These districts frequently monitor petty cash for these funds and maintain the integrity of submitted receipts.

Recommendation 52:

Centralize the activity fund accounts to improve internal controls.

The district should centralize the activity funds in phases. The elementary schools' activity funds should be centralized first and then the secondary schools activity funds. This will provide the district with internal controls over the funds that generated the majority of comments in the internal audit report on activity funds. This will also allow the district to ensure the accounting system used and the procedures established for the centralization of activity funds are functioning appropriately before the schools with the greatest activity are added to the system.

The elementary bank accounts should be closed at the end of August 2003 and accounts payable should be established for any checks still outstanding at the end of August to ensure funds are available to issue new checks to the payees. The district should provide training to school secretaries at the elementary level upon their return to work at the beginning of the fall semester. The same procedures should be used to centralize the secondary accounts at the end of August 2004.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer, administrator for Finance, Agency Funds accountant, principals from each grade level and a representative from Internal Audit meet to discuss and formulate a plan to consolidate the activity fund bank accounts and centralize the accounting system.	March 2003
2.	The chief financial officer presents the plan to the	April 2003

	superintendent for review and approval and prepares an agenda item for the next board meeting.	
3.	The superintendent presents the plan to centralize the activity fund accounting and consolidate activity fund accounts to the board for approval and receives approval.	May 2003
4.	The administrator for Finance and Agency Funds accountant revise the activity fund manual to include a standard chart of accounts, revisions to purchasing procedures and accounting procedures for use on the district's financial accounting system.	June 2003
5.	The chief financial officer opens a bank account at the depository bank for activity funds.	July 2003
6.	The elementary school principals close their activity fund accounts and forward the funds to the administrator for Finance to be deposited in the central activity fund account.	August 2003
7.	The administrator for Finance and Agency Funds accountant provide training to the school principals and secretaries on the new procedures for activity funds.	August 2003
8.	The elementary schools begin using the centralized activity fund accounting system.	September 2003
9.	The Agency Funds accountant reviews the monthly financial activity for all schools and credits each school with a proportional amount of interest earned on the activity funds bank account.	October 2003 and Monthly
10.	The secondary school principals close their activity fund bank and investment accounts and forward the funds to Finance to be deposited in the central activity fund account.	August 2004
11.	The administrator for Finance and Agency Funds accountant provide training to the school principals and bookkeepers on the new procedures for activity funds.	August 2004
12.	The secondary schools begin using the centralized activity fund accounting system.	September 2004

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 6
ASSET AND RISK MANAGEMENT

B. RISK MANAGEMENT

An effective risk management program provides a safe environment for students and employees, minimizes workers' compensation claims and costs, controls costs by ensuring that the district is adequately protected against significant losses with the lowest possible insurance premiums and provides sound and cost effective health insurance for district employees. In order to ensure the district is protected against significant losses, the district must have accurate insurable values for district property and be able to document all property owned by the district. Annual appraisals of property values and inventories of fixed assets provide for accurate insurable values and documentation of district property. Districts assess hazards and implement programs to reduce those hazards in order to minimize claims and reduce premiums for workers' compensation.

The administrator for Employee Benefits maintains responsibility and oversight of the district's risk management functions and has seven employees supporting the functions. **Exhibit 6-13** presents the organization of the Insurance and Safety Department.

Exhibit 6-13
Risk Management Functions Organization
November 2002
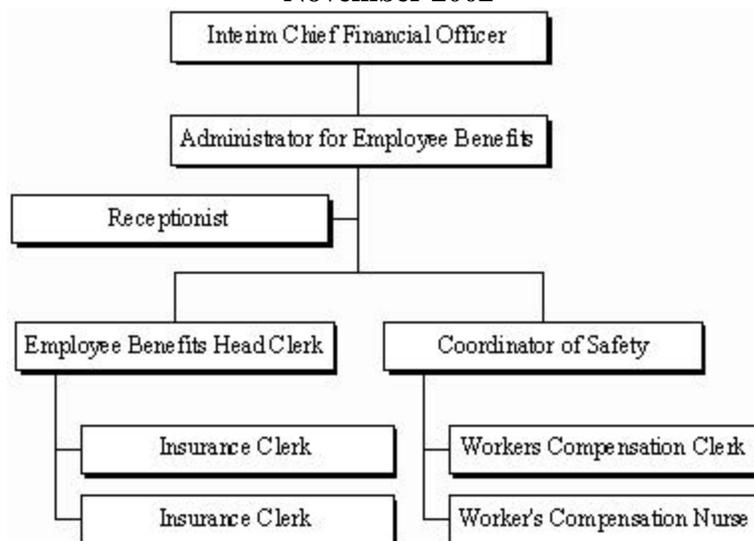
Source: BISD, administrator for Employee Benefits, November 2002.

BISD insures itself against loss for real and personal property, liability, flood, windstorm, school professional legal liability, vehicle loss or damage, law enforcement liability, storage tank liability and employee crime through insurance polices provided by a variety of companies.

Exhibit 6-14 presents a summary of these coverages.

Exhibit 6-14
Insurance Coverages

Coverage Type	Coverage Limit	Deductible	Company	Cost
Property - Blanket Replacement Cost	$428,447,267	$50,000	Royal Surplus Lines Insurance Company	$616,773
Contractor Equipment	$283,677	$5,000		
EDP	$26,647,611	$5,000		
Band Instruments and Uniforms	$2,900,000	$5,000		
Mobile Radio Equipment	$699,991	$5,000		
Wind, Hurricane and Hail Deductible		$2,192,000		
Flood	$10,000,000	$250,000		
Excess Windstorm and Hail	$216,407,703	$50,000	Texas Windstorm Insurance Association	$859,879
Excess Flood	$150,257,828		Various	$352,085
Employee Crime:			Hartford Fire Insurance Company	*
Theft	$100,000	$1,000		
Forgery	$50,000	$1,000		
Theft, Disappearance	$100,000	$1,000		
Law Enforcement Liability	$2,000,000	$2,500	Zurich	$31,186
General Liability	$2,000,000	$5,000	Coregis	$158,423
Vehicle Coverage - Combined Single Limit Liability	$2,000,000	$10,000	Coregis	$321,020
Errors and Omissions	$2,000,000	$50,000	Texas Association of School Boards (TASB)	$75,464
Boiler and Machinery	$26,353,000	$7,500	Hartford Steam	$16,376

			Boiler	
Storage Tank Liability	$1,000,000	$7,500	Zurich	$2,265

House Bill 3343 passed by the 77[th] Legislature in 2001 established a statewide health care program for employees of school districts. School districts with 500 or fewer employees began to participate in the program effective September 1, 2002 unless the districts met certain exceptions. Districts with more than 500 employees will have an opportunity to join the plan in 2005-06 unless an earlier option date is provided. BISD will have the option of participating in the plan in 2005-06.

BISD provides health insurance to its employees through a self-insured plan with Mutual of Omaha. The district pays the cost of the employee-only coverage in the basic plan and provides a $15,000 life insurance policy for all employees. **Exhibit 6-15** presents a summary of the health insurance plans and related costs for in-network services available to district employees.

Exhibit 6-15
BISD Employee Benefits
October 2002

Feature	Basic Plan	High Plan	State Plan
Deductible	$500 Individual/ $1,000 Family	None	None
Physician Co-pay	$30	$25	$15
Co-insurance	80%/20% to $20,000	80%/20% to $10,000	80%/20% to $5,000
Emergency Room	$150 co-pay and 80%	$75 co-pay and 80%	$50 co-pay and 80%
Prescription Drugs Generic Brand Formulary Non-formulary Mail Order	Drug Card $20 co-pay $40 co-pay $60 co-pay Yes	Drug Card $20 co-pay $40 co-pay $60 co-pay Yes	Drug Card $5 co-pay $20 co-pay $35 co-pay Yes
Rate (Employee Cost) Employee Only	$0 $254.37	$142.50 $523.64	$279.91 $809.10

Employee and Spouse	$254.37	$523.64	$809.10
Employee and Children	$214.08	$464.18	$725.87
2 Employees and Children	$425.41	$779.90	$1,155.69
Employee and Family			
District Contribution	$285.99	$285.99	$285.99

Source: BISD, Insurance and Safety Department, October 2002.

The district started the self-insured health insurance plan October 1, 2002. A committee selected the self-insurance plan, and the board subsequently approved it as the best proposal received in response to the district's request for health insurance proposals. The board appointed the committee, which included two medical doctors and seven employees. The district also hired an insurance consultant to work with the committee during plan evaluations, and the consultant supported the committee's recommendation. The district received 22 proposals and received presentations from five of those companies. Of the five proposals presented to the committee, three were self-funded and two were fully funded plans. If the district selected the same fully funded plan it had before October 2002 with Mutual of Omaha, the district's costs would have increased by 27.9 percent. Under the plan selected by the district, costs will increase by 7.2 percent for 2002-03 according to projections determined by the committee.

BISD funds the plan based on the worst-case cost calculated by the insurance consultant. This cost to the plan is $4.8 million more than the district's expected costs. The expected costs are based on what the district expects to incur and are the best-case scenario for the plan. If the plan performs at the expected level, the district will have additional funds available to provide additional benefits in the future or to absorb a portion of the normal medical cost inflation, because the district is funding the plan at the worst-case cost. Mutual of Omaha provides monthly loss runs and claims reports to the district for the plan. The district reviews these reports monthly to monitor the performance of the plan. The plan has a specific stop loss of $250,000 per insured and an aggregate stop loss of $1,000,000.

The district chose to fund the plan as a 12/12 contract when they adopted the plan in September 2002. A 12/12 contract means that claims incurred and paid in the contract year are the only claims considered. This means that claims incurred in the final month of the contract year and paid in the following period are not considered in the cost. The claims incurred in the final month of the contract year and paid in the following month are also

excluded from the stop loss insurance. By funding the contract in this manner, the district has deferred approximately $4.5 million in costs to the following year. This represents 23.3 percent of the expected costs for the 2002-03 plan. The committee determined that if the district changes to a fully funded plan in October 2003, the district will have to pay the claims incurred but not paid in the prior plan year. If the district continues the self-funded plan, the district will have to increase contributions to cover these claims.

The district also provides the opportunity for employees to participate in a number of other benefit programs at the employee's expense. The district makes dental insurance, cancer insurance, disability insurance, additional life insurance and personal accident insurance available to employees through payroll deduction. The district also provides a cafeteria plan salary reduction agreement, through which employees can have pre-tax earnings redirected to pay certain insurance premiums, out-of-pocket medical expenses and dependent care expenses.

BISD also provides employees with payroll deductions for tax-sheltered annuity plans. The district allows companies certified by TRS to solicit employees and have the funds deducted from their pay. TRS included 36 companies on its certified list in August 2002. The district had no restrictions placed on the number of companies it would make employee annuity deductions for in the past, so it uses approximately 75 companies.

BISD participates in a self-funded interlocal agreement for workers' compensation. The agreement with Texas Workers' Compensation Solutions requires the district to fund the fixed costs associated with claims administration and the stop loss insurances. The district must also fund the losses associated with claims from the district up to a maximum loss fund. The district's estimated maximum cost for 2001-02 is $6.98 million.

FINDING

BISD has implemented a safety awareness and training program to reduce the number and severity of workers' compensation claims. The 1994 TSPR report recommended the development and implementation of a safety program. The Texas Workers' Compensation Commission (TWCC) first declared BISD a hazardous employer in June 1999 and then again in May 2001. A hazardous employer is defined as an employer that exceeds the expected accident rate per 100 employees for their classification. BISD is classified as elementary and secondary schools and exceeded the threshold of 1.6 accidents per 100 employees with an accident rate of 1.9. TWCC establishes accident prevention plans (APP) with hazardous employers to assist them in reducing the number of work related accidents and illnesses.

BISD implemented the safety awareness and training program as part of the APP.

The safety awareness and training program educates and familiarizes employees with safety procedures, rules and work practices of BISD. New employees receive information on safety during their orientation to the district. The packet of information provided to new employees includes the district's safety policy statement; the employee's safety responsibilities; the basic safety rules; employee rights and responsibilities under the Texas Workers' Compensation System and a notice required by the Texas Hazard Communication Act. The district provides all these materials in both English and Spanish languages.

Employees receive monthly training on a variety of topics. The program is based on a train-the-trainer model. Each school and department must appoint a safety coordinator for the area. The safety coordinator agrees in writing to carryout five functions at his/her location:

- documenting fire drills;
- performing safety inspections and submitting related work orders;
- conducting safety meetings;
- submitting injury reports; and
- conducting accident investigations.

Safety coordinators must conduct fire drills at schools each month that there are at least ten days of school. The safety coordinator must document the fire drill and submit the documentation to Insurance and Safety. The safety coordinator must submit safety inspections and related work orders to correct deficiencies monthly. The safety coordinator files injury reports and conducts accident investigations as needed, within the established timelines.

The safety coordinators from each location attend a monthly meeting. They review the loss runs for the previous month for discussion at their locations. The safety coordinators receive and review safety training materials for use at their locations. After the safety coordinators meeting, the coordinators are responsible to return to their location and provide the covered training to the employees at their locations.

As a result of the emphasis on safety awareness and training, BISD has reduced the amount of claims incurred by more than $497,000. The average cost per claim decreased by $471 from $4,072 in 2000-01 to $3,601 in 2001-02. **Exhibit 6-16** presents a comparison of the number of claims and the claims' costs incurred for the period from 1997-98 through 2001-02.

Exhibit 6-16
Number of Claims and Claims Costs Incurred
1997-98 through 2001-02

Year	Number of Claims	Claims Costs Incurred
1997-98	1,391	$3,946,146
1998-99	1,500	$5,414,801
1999-2000	1,391	$6,300,090
2000-01	1,239	$5,044,901
2001-02	1,263	$4,547,562

Source: BISD, Insurance and Safety Department, Workers' Compensation Claims Analysis, August 31, 2002.

The total number of claims for 2001-02 increased from 2000-01, and the type of claims has changed. The district has 52 claims open from 2000-01 and 367 claims open from 2001-02 on August 31, 2002. Record-only claims are made when employees are injured on the job, but do not collect benefits for either lost time or medical expenses. **Exhibit 6-17** presents the claims by type for 2000-01 and 2001-02.

Exhibit 6-17
Number and Type of Claims
2000-01 and 2001-02

Claim Type	2000-01	2001-02	Percent Change 2000-01 to 2001-02 Over/(Under)
Indemnity	157	131	(16.56%)
Medical Only	977	429	(56.09%)
Record Only	105	703	569.52%
Total Claims	**1,239**	**1,263**	**1.94%**
Total Employees	**6,159**	**7,656**	**24.31%**
Gross Payroll	$180,244,734	$224,106,114	24.33%

COMMENDATION

BISD implemented a safety awareness and training program to reduce the number, severity and cost of workers' compensation claims.

FINDING

The district does not have a light-duty program allowing employees who sustain work related injuries to return to work with a reduced schedule or a temporary modification of their job duties. Board policy DEC (Local), leaves and absences, states "upon the District receiving medical clearance (showing that the employee is physically able to perform the essential functions of his or her position, given reasonable accommodations if necessary) for an employee ... who has been receiving workers' compensation benefits, to return to work, the employee shall be placed back on the District payroll effective the first working day after the District receives all necessary medical clearance, or upon the employee's actual return to work, whichever is later."

Examples of light-duty situations employed by many school districts are the temporary modification of a job, allowing the employee to return to work on a part-time basis or finding another job for the employee that does not have the same physical demands based on skills possessed by the employee. These modifications for an employee are considered to be more than the reasonable accommodations contemplated by board policy DEC (Local). Light-duty assignments allow the employee to gradually return to work and build up their strength and endurance. Many school districts use a light-duty program to assist maximize benefits for both the district and the injured employee.

Many districts have also implemented light-duty policies to assist in cost containment of workers' compensation claims. Corpus Christi ISD initiated an alternative duty program that encourages temporarily injured workers to return to work early. Accommodations are made so workers can return to work as soon as possible. Both the districts that implement light-duty policies and the employees of those districts receive benefits by:

- reducing injury severity;
- maintaining an experienced work force;
- minimizing medical care expenses;

- reducing lost time compensation costs;
- accelerating the employees' recovery;
- promoting employee moral and security;
- reducing indirect costs of injuries;
- avoiding costly litigation; and
- reducing chances of permanent disability and vocational rehabilitation.

TASB has policy services and supplies districts with standard policies that can be modified to meet the needs of individual districts.

Recommendation 53:

Implement a light-duty policy for employees.

The district should encourage employees to return to work as soon a possible. A light-duty policy will enable employees who have been injured on the job to return to work and perform less than 100 percent of their work assignment. This policy will be beneficial to both the employees and the district.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board directs the superintendent to develop a light-duty policy for employees receiving workers' compensation benefits.	March 2003
2.	The superintendent and administrator for Employee Benefits meet to discuss a light-duty policy, and the superintendent directs the administrator to obtain model policies.	April 2003
3.	The administrator for Employee Benefits contacts TASB, TWCC and other districts for examples of light-duty policies.	April 2003
4.	The superintendent, administrator for Employee Benefits, coordinator of safety and administrators for Personnel meet to discuss the model policies and draft a light-duty policy for presentation to the board.	May 2003
5.	The superintendent presents the policy to the board for review and consideration.	June 2003
6.	The superintendent presents the policy, with revisions if necessary, to the board for approval and receives approval.	July 2003
7.	The administrator for Employee Benefits implements the policy.	August 2003

FISCAL IMPACT

The savings for implementation of this recommendation are based on reducing future workers' compensation claims. BISD should be able to achieve these savings in addition to savings from other efforts to reduce workers' compensation claims. The fiscal impact for this recommendation is calculated by multiplying the number of claims open by the average cost per claim and multiplying that amount by an assumed savings of 10 percent on each claim. The cost for these 367 claims is $1,321,567 (367 claims x $3,601 average cost per claim = $1,321,567) and the annual savings would be $132,157 ($1,321,567 x .1 = $132,157) a year.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Implement a light-duty policy for employees.	$132,157	$132,157	$132,157	$132,157	$132,157

FINDING

The district does not have copies of all of its insurance policies. The district maintains a spreadsheet of insurance information that contains the insurance carrier, premium, amount of coverage, type of coverage and other pertinent information for all policies purchased by the district. The Employee Benefits head clerk was able to locate the majority of insurance policies and was able to find the binders for all but one policy. A binder is a statement from an insurance company that they have agreed to provide insurance and will issue a policy upon receipt of the premium.

The responsibility for insurance procurement was moved from Purchasing to Safety and Insurance in September 2001 and some of the policies, according to the Employee Benefits head clerk, may have been misplaced during the movement of the insurance records.

This movement of responsibility for insurance procurement followed the discovery of the district's noncompliance with bidding regulations in regards to all insurance policies. **Exhibit 6-18** presents the insurance policies the district does not have.

Exhibit 6-18
Insurance Policies Not Located
September 2002

Insurance Company	Type of Coverage	Premium Paid
Hartford Fire Insurance Company	Crime	**
Employer's Reinsurance	Worker's	Included in Interlocal

Corporation	Compensation Stop Loss	Agreement
Coregis	General Liability	$158,423
Coregis	Vehicle Coverage	$321,020
Texas Windstorm Insurance Association*	Excess Windstorm	$859,879

Source: BISD, Employee Benefits head clerk, September 2002.
* No binder was found for this policy.
** The Employee Benefits head clerk was unable to find the premium amount for this policy.

An insurance policy contains the policy limits, perils covered, exclusions, terms and conditions of the coverage the district has purchased. Many districts have a single repository for insurance policies. By doing this, the districts are assured that all policies are in the possession of the district and the district has ready access to information concerning the coverage they have for specific events. Upon receipt of these individual policies, many districts compare them to the specifications used for the bid process, then summarize them and file them in a fireproof location. Without the policy, the district cannot determine what events are or are not covered. If the district files a claim that is contested by the insurance carrier and the district does not have the insurance policy, the district is at risk of being unable to defend its assertions that the claim is covered.

Recommendation 54:

Maintain a central file of all insurance policies for the district and update the insurance information spreadsheet to reflect premiums and coverages annually.

The district should maintain all insurance policies in a secure location. Upon receipt of the policies, the administrator of Employee Benefits should review them to determine the district's coverages and exclusions in the policies. The administrator should document this information in a summary of the policy, and the district can use this information to assist it in the next insurance procurement process.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent directs the administrator of Employee Benefits	March

	to obtain copies of all insurance policies.	2003
2.	The administrator of Employee Benefits contacts the insurance companies and obtains copies of the insurance policies.	April 2003
3.	The administrator of Employee Benefits reviews and summarizes the insurance policies and files them in a secure location.	May 2003
4.	The administrator of Employee Benefits updates the insurance information spreadsheet upon renewal of existing or purchase of new policies.	Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The district has not fully implemented the blood borne pathogen exposure plan required by the Texas Department of Health (TDH). The district has provided training to all employees on blood borne pathogens and has made personal protective equipment available to its employees. The district has not made the hepatitis B vaccine available to employees identified as having occupational exposure to blood or other potentially infectious materials, the targeted group.

The targeted group in BISD includes 814 personnel employed as nurses, nurse aides, trainers, special education staff, special education bus monitors, police officers and security personnel. The job descriptions for employee classifications in the targeted group have not all been updated to include the determination. For example, the police officers' job description does not include the risk of exposure to blood borne pathogens, even though the job classification is identified in the plan as a targeted group. The district has not reviewed the plan since its completion in April 2001.

In September 2000, TDH mandated public schools to develop a blood borne pathogen exposure plan. The minimal plan requirements included determining job classifications that have an occupational risk of exposure, developing an implementation schedule and methodology and reviewing the plan annually. The district developed a plan in December 2000 that was approved by the interim superintendent in February 2001. The plan was based on the model plan provided by TDH and includes the requirements necessary for compliance.

Many governmental entities have implemented blood borne pathogen programs. These entities have taken the steps necessary to help ensure the safety of their employees.

Recommendation 55:

Implement the blood borne pathogen exposure control plan and conduct annual evaluations of the plan.

The district should review the plan and determine if it needs to modify the plan. Once the plan has been reviewed and modified, if necessary, the district should implement the plan to help ensure the safety of its employees.

As part of the implementation of the plan, the district should offer the hepatitis B vaccine to employees identified as having occupational exposure to blood or other potentially infectious materials based on the review of the plan. The district should also update the job descriptions for all positions in the targeted group to include the determination.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent directs the coordinator of Safety to form a committee, including nurses, to review the district's blood borne pathogen exposure control plan.	April 2003
2.	The coordinator of Safety forms the committee; the committee reviews the plan, makes changes as necessary and presents the plan to the superintendent for review and approval.	May 2003 and Annually
3.	The superintendent reviews, approves and presents the plan to the board for approval and receives approval.	June 2003
4.	The superintendent includes the cost of implementing the plan in the budget for 2003-04.	July 2003
5.	The board approves the budget.	August 2003
6.	The superintendent directs the coordinator of Safety to implement the plan.	September 2003

FISCAL IMPACT

The fiscal impact for this recommendation is calculated by multiplying the estimated cost per vaccination series by the number of employees included in the target group. The cost for 814 employees is $81,400 (814 employees x $100 estimated cost per vaccination series = $81,400). The cost of $8,140 for all years after 2003-04 is based on 10 percent of the employees in the target group being replaced annually ($8,140 = 814 x .10 x $100).

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08

Implement the blood borne pathogen exposure control plan and conduct annual evaluations of the plan.	($81,400)	($8,140)	($8,140)	($8,140)	($8,140)

Chapter 6
ASSET AND RISK MANAGEMENT

C. FIXED ASSET MANAGEMENT

An effective fixed asset management system accounts for district property accurately and safeguards it against theft and obsolescence. The TEA defines fixed assets as purchased or donated items that are tangible with a unit cost of greater than $5,000 and a useful life of more than one year. Planning and control of fixed asset transactions is crucial to the long-range financial plan of the district. With the implementation of Governmental Accounting Standards Board (GASB) Statement 34 that requires districts to depreciate fixed assets, the importance of the fixed asset management system is increased.

The administrator for Warehouse/Textbooks/Fixed Assets oversees the district's fixed assets and has a staff of eight personnel dedicated to fixed asset administration. The administrator for Warehouse/Textbooks/Fixed Assets is also responsible for the district's warehouse and textbook operations and a coordinator for Warehouse/Textbooks/Fixed Assets assists with these responsibilities. **Exhibit 6-19** presents the organization of fixed assets administration.

Exhibit 6-19
BISD Fixed Assets Administration
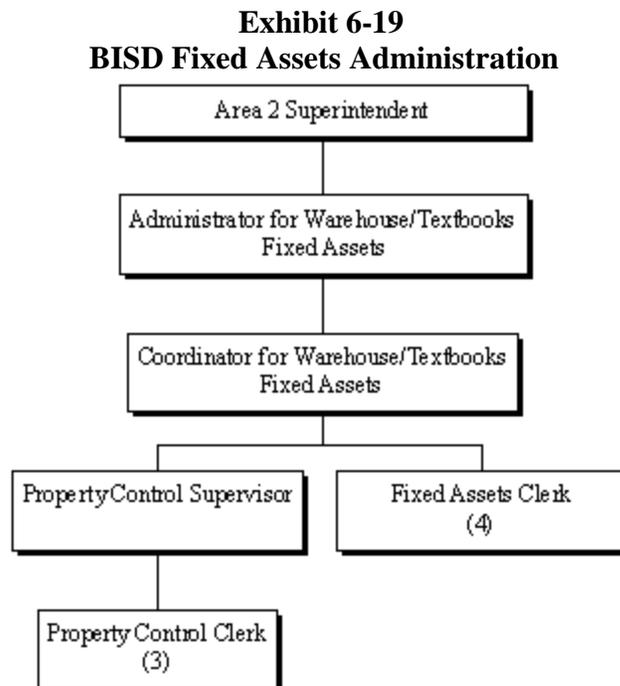
Source: BISD, administrator for Warehouse/Textbooks/
Fixed Assets, September 2002.

BISD maintains a comprehensive fixed asset listing of all land, buildings and equipment owned by the district. The district uses the $5,000 capitalization limit in determining fixed assets to be added to the general fixed assets account group in its financial statements. In preparation for the implementation of the GASB 34, assets with a value less than $5,000 were removed from the fixed asset account group. **Exhibit 6-20** presents the activity in the fixed assets account group for the year ended August 31, 2002.

Exhibit 6-20
General Fixed Assets Account Group
August 31, 2002

Asset Type	Balance September 1, 2000	Additions	Deletions	Balance August 31, 2001	Balance as a Percent of Total
Land	$6,799,044	$460,244	$0	$7,259,288	2.5%
Buildings and Improvements	$197,430,629	$22,121,341	$0	$219,551,970	76.8%
Construction in Progress*	$35,163,803	$0	$0	$35,163,803	12.3%
Equipment	$7,182,814	$912,798	$393,241	$7,702,371	2.7%
Vehicles	$14,575,307	$1,750,702	$78,041	$16,247,968	5.7%
Total	**$261,151,597**	**$25,245,085**	**$471,282**	**$285,925,400**	**100.00%**

Source: BISD Warehouse/Textbooks/Fixed Asset Department, September 2002.
*Information on Construction in Progress not available as of September 2002.

The assets recorded in the general fixed asset account group are mainly buildings, vehicles and large pieces of equipment. These types of assets do not lend themselves, due to the nature and size of the asset, to misappropriation or theft. The district maintains a list of all equipment with a value greater than $500 and items considered at high risk of theft, generally electronics, valued at $150 or more. Assets disposed of are removed from the general fixed asset account group and the asset listing at historical cost or the value recorded.

The district uses Records Consultants Incorporated (RCI) Fixed Asset Management Program (FAMP) software to maintain the asset listings and the district's financial software program to maintain the fixed asset account group. The district is in the process of converting all assets,

including the fixed asset account group, to an updated RCI program and is running the two programs concurrently to ensure a smooth transition. The conversion will eliminate the duplication of posting items to both the RCI and financial management systems.

The updated system is designed to be compliant with all aspects of GASB 34 as it relates to fixed assets. The Warehouse/Textbooks/Fixed Assets Department has established useful lives for all classes of property, identified salvage values, adopted the straight-line method of depreciation and determined a capitalization threshold for items in the fixed asset account group. Straight-line depreciation expenses the asset equally over its estimated useful life. Items that cost $5,000 or more and have a useful life of more than two years will be added to the fixed asset account group. The administrator for Warehouse/Textbooks/Fixed Assets has attended training and worked with the external audit firm to ensure the district is ready to comply with the requirements of GASB 34 as it relates to fixed assets.

FINDING

BISD has a comprehensive and effective fixed asset management program (FAMP). The district distributes a fixed asset procedures manual to the schools and departments that reflects the actual procedures related to fixed assets. The manual includes a definition of fixed assets added to the fixed asset account group and locally defined fixed assets tracked with FAMP. The manual describes the process from when a school or department prepares a requisition to the disposition of obsolete assets. The manual also includes flowcharts for many of the procedures and the forms necessary for schools and departments to mange fixed assets. Much of the information contained in the manual is also posted to the district's website at http://www.brownsville.isd.tenet.edu/fixed_assets/.

The district uses the *FASRG* recommended $5,000 limit for fixed assets added to the fixed asset group of accounts in the district's financial statements and defines fixed assets for tracking purposes as those with a cost of $500 to $4,999. The district also defines electronic equipment that costs $150 to $500 as fixed assets for tracking purposes, and the manual provides examples of assets to be included in this category. **Exhibit 6-21** presents the Fixed Asset Definition chart from the fixed assets manual.

Exhibit 6-21
Fixed Asset Definitions
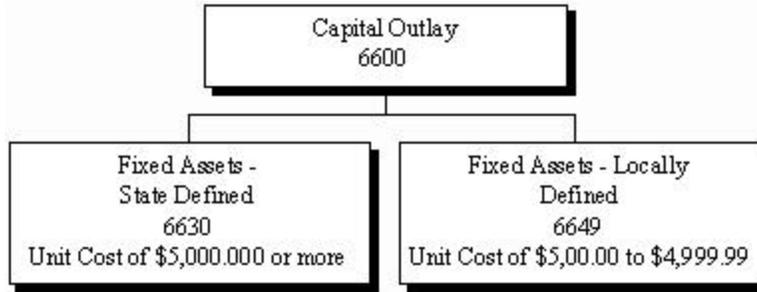
```
                    ┌─────────────────────┐
                    │   Capital Outlay    │
                    │       6600          │
                    └─────────────────────┘
                    ┌──────────┴──────────┐
        ┌───────────────────────┐  ┌───────────────────────────┐
        │     Fixed Assets -    │  │   Fixed Assets - Locally  │
        │     State Defined     │  │         Defined           │
        │        6630           │  │          6649             │
        │ Unit Cost of          │  │ Unit Cost of $5,00.00 to  │
        │ $5,000.000 or more    │  │      $4,999.99            │
        └───────────────────────┘  └───────────────────────────┘
```

Source: BISD, Fixed Asset Procedures Manual, September 2002.

The Warehouse/Textbooks/Fixed Assets Department staff reviews all requisitions coded to the 6600 series of accounts on a daily basis to ensure that all assets are appropriately coded for control purposes. The property control clerks receive a copy of the purchase order and files it awaiting receipt of the items. BISD uses central receiving for purchases, which allows for the capture of items for identification and tagging. The warehouse receives the items and transfers them to the property control clerk for tagging, recording and repackaging before the item is shipped to the school or department. **Exhibit 6-22** presents the flowchart that depicts this process.

Exhibit 6-22
Receiving Process for Fixed Assets

BISD Warehouse Department Fixed Assets Receiving Procedures

```
A                                          B

Receiving Clerk
completes Fixed Assets
Log

Merchandise transferred         Partial Shipment? ──Yes──▶  Clerks make photocopy
to Fixed Assets Area                                        of Blue Copy and sign
                                      │                      for items received
                                      No
                                      │
Property Control Clerks          Blue Copy signed as
verify items and sign as         complete and sent to
received                         Accounts Payable for
                                 payment

Property Control Clerks   *Req/PO blue      Photocopy/Blue Copy
verify merchandise        copies forwarded to   sent to Accounts Payable
against Requisition/PO    Fixed Assets          for payment
Blue Copy                 from Purchasing
                          Department daily    Note: If items do not match p.o., discrepancy report
                                              completed and purchasing contacted.

Property Control Clerks          Merchandise palletized        Go to Shipping Process
complete Fixed Assets            and sorted by route with
Data Entry Form                  location and p.o. #
                                 identified

Merchandise tagged with          Fixed Assets Data Entry
a fixed assets label and         Form forwarded to Fixed
package is resealed               Assets Department for
                                 posting to system

B                                End Process
```

Source: BISD, Fixed Asset Procedures Manual, September 2002.

The Warehouse/Textbooks/Fixed Assets Department staff conducts physical inventories of the district's fixed assets annually. A memo is sent to each school and department informing the fixed asset administrator, designated by the principal or department head, when the fixed asset inventory is scheduled to eliminate school or department conflicts. The fixed asset clerks call the administrator a few days before the inventory to remind them of the inventory and to remind them to have all assets in plain sight to facilitate the scanning of the asset tags. This includes

removing cameras and other small items from locked closets or cabinets.
Exhibit 6-23 presents the flowchart depicting the inventory process.

Exhibit 6-23
Fixed Asset Inventory Process
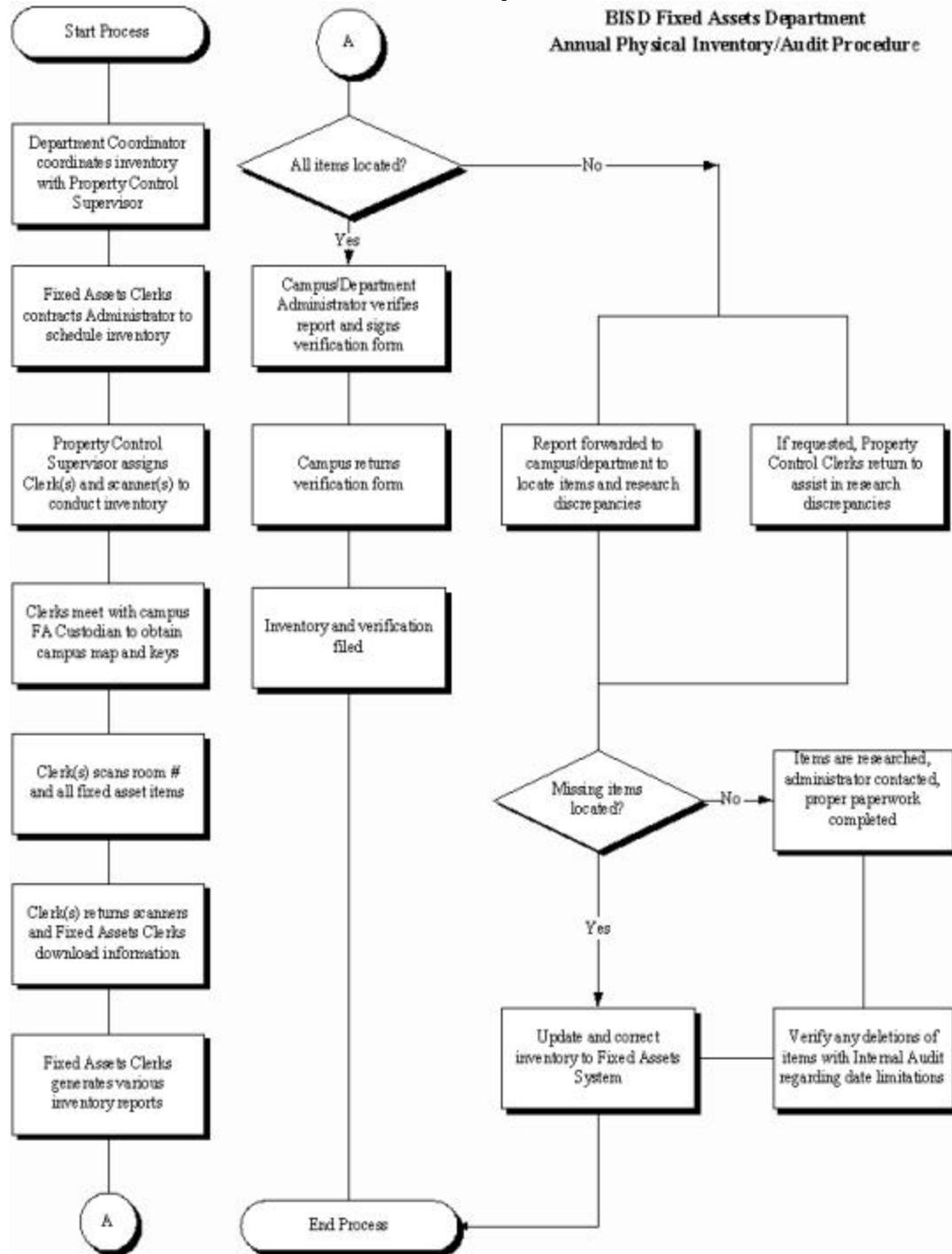
Source: BISD, Fixed Asset Procedures Manual, September 2002.

The school or department administrator receives a number of reports from the inventory process including the following:

- fixed asset listing by room;
- missing from inventory by location report;
- location changes report;
- research list report; and
- verification form.

The missing from inventory report details the fixed assets that were not found at the school or department during the inventory process. The location's fixed assets administrator receives the list and determines if the items are still at the location, but not inventoried; if the items were transferred to another location without a transfer form; if the item was disposed of without a disposal form; or if the item is simply missing. Since the inventories are done during the instructional or working day, some items are not inventoried because they are stored in cabinets, closets or other areas and were not accessible to the inventory control clerk. When the fixed assets administrator at the location finds items, the inventory control clerk will return to scan the items and update the reports.

The location changes report details items found at the location that are shown at a different location in the fixed asset system. Generally these items have been moved without a transfer form being filed or have been loaned from one location to another. The research list report details items found at the location that are not in the fixed asset system. The fixed asset clerk adds these items to the inventory after researching the item. The location's administrator signs the verification form upon completion of the inventory process.

The fixed asset procedure manual contains the forms and detailed instructions on filling out the forms used to manage fixed assets in the district. These forms include: fixed assets disposition and notification form; donated items form; fixed assets transfer form; and the authorization to borrow computer equipment form.

The manual details the process for disposal of obsolete fixed assets in the district either through public auction or other means. Surplus items are collected by the Warehouse/Textbooks/Fixed Assets Department and held for quarterly auctions. The items to be disposed of are compiled into an agenda item for board approval, and the board approves of the disposition of the assets. Auction proceeds are deposited to the appropriate fund - food service fund, general fund or other fund - at the completion of the auction.

The review team interviewed three principals to determine the perception of the schools about the fixed asset system and the extent that the fixed asset manual reflected the district's operations in this area. All three of the principals agreed the district had a good fixed asset management system and the procedures outlined in the manual were followed. One of the principals expressed concern that it took some time for obsolete items to be picked up from the school. The review team selected a number of items at four different locations and provided the asset tag number to the Warehouse/Textbooks/Fixed Assets Department to test the accuracy of the fixed asset listing. Of the 18 items selected, the Warehouse/Textbooks/Fixed Assets Department was able to provide the location, room number and description of all items, except for one item that had been removed from the listing. The review team also selected five items from the fixed asset listing for three schools and was able to locate each of the items at the schools. The review team also reviewed documentation in the Warehouse/Textbooks/Fixed Assets Department files and observed the receiving, tagging and shipping of fixed assets to confirm the procedures outlined in the manual reflected the actual practices of the district.

COMMENDATION

BISD implemented a comprehensive and effective fixed asset management system to ensure accurate accountability of the district's investment in fixed assets.

FINDING

BISD does not have a board policy that defines fixed assets, establishes a depreciation method or establishes responsibility for safeguarding of assets. Although the district uses a $5,000 threshold and a useful life of more than two years for determining whether assets are recorded in the fixed asset group of accounts, no board policy exists that sets that threshold. The district uses the straight-line method to depreciate the fixed assets of the district, but no policy exists that addresses the depreciation of fixed assets. The Warehouse/Textbooks/Fixed Assets Department inventories the assets, and an administrative policy establishes responsibility for fixed assets with the principal or department head, but no board policy exists to assign responsibility for assets that are lost, stolen or misplaced.

GASB 34 does not prescribe a minimum level for the capitalization of assets; however, it does require districts to disclose the dollar value above which asset acquisitions are added to the capital accounts. TEA suggests a $5,000 per unit cost. GASB 34 does not prescribe the method of depreciation to be used to depreciate capital assets, but it does require

disclosure of the method in the annual financial statements. TEA recommends the straight-line method.

The FASRG states that adequate procedures are essential to the protective custody of school property.

Many school districts use TASB policy service to assist with the development of their board policies for fixed assets. The policies developed by TASB for these districts generally include a definition of fixed assets and locally defined assets. The policies also include requirements for annual inventories of fixed assets and designate responsibility for the safekeeping of fixed assets. These local policies are designed to meet the needs of the individual school districts.

Many districts delegate authority for the custody and maintenance of district assets by school and then through district administration to ensure the protective custody of all district property and to maintain an appropriate level of internal control. In addition, many districts have written procedures and policy about lost, missing or stolen property.

Recommendation 56:

Adopt a board policy that defines the value of fixed assets that should be capitalized, establishes the depreciation method that should be used and assigns responsibility for safeguarding fixed assets.

The district should have a policy that defines fixed assets and the depreciation method the district will use in the implementation of GASB 34. These two items are required to be disclosed in the annual financial statements and should reflect board policy.

The policy should affirm the administrative policy in assigning responsibility to the school principals and department heads for all assets in their custody. The policy should also address the consequences for not safeguarding the assets in their custody. Although the district has an administrative policy assigning responsibility for assets, the enforcement of the policy is subject to administrative discretion. A board policy establishes the standard of accountability and consequences and is not subject to administrative discretion.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board directs the superintendent to develop a policy that defines fixed assets, establishes a depreciation method for fixed assets and assigns responsibility for assets of the district.	March 2003

2.	The superintendent meets with the chief financial officer and the administrator for Warehouse/Textbooks/Fixed Assets to determine if the administrative policy contains the appropriate threshold for capitalizing fixed assets and the method for depreciating those assets.	April 2003
3.	The superintendent meets with the assistant superintendents, area superintendents, chief financial officer, administrators and principals to discuss and determine if the administrative policy assigns responsibility for assets to the appropriate level.	April 2003
4.	The superintendent contacts TASB policy services for assistance in developing a policy for the district's assets.	May 2003
5.	The superintendent presents the policy to the board for review and consideration and revises the policy, if necessary.	June 2003
6.	The superintendent presents the policy to the board for approval.	July 2003
7.	The superintendent distributes the policy and directs its implementation.	July 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 6
ASSET AND RISK MANAGEMENT

D. BOND ISSUANCE AND INDEBTEDNESS

Bonds are contractual representations that a debt is owed by one party, the issuer, to one or more other parties, the investors. Bonds may be secured by lien on personal or real property or may be unsecured. The contract between the issuer and the investors is the bond indenture. The bond indenture specifies the maturity date, interest payments, denominations of principal, call and/or conversion provisions, security, the trustee, repayment plans such as a bond sinking fund and special provisions. An effective bond management program ensures the district complies with bond covenants, defines the restrictions for what the bond funds can be used for, states how the bonds will be repaid and ensures that outstanding bonds pay the lowest interest rate possible.

BISD has issued bonded debt to construct facilities and acquire furnishings for those facilities. BISD has also refunded several of its outstanding bond issues to reduce the associated interest cost on those issues or to restructure the outstanding debt. Refunding is a process where the district is able to pay off the old bonds with new bonds. The district has several outstanding bond issues and **Exhibit 6-24** presents general information on those bonds.

Exhibit 6-24
BISD Bonded Indebtedness
August 31, 2002

Description	Interest Rate	Original Issue Amount	Bonds Payable August 31, 2002
Unlimited Tax School Building and Refunding Bonds, Series 1988	7.35%	$18,384,003	$201,970
Unlimited Tax Refunding Bonds, Series 1992	6.2%	$8,144,446	$1,470,000
Unlimited Tax Refunding Bonds, Series 1993	3.9%	$8,310,000	$3,510,000
Unlimited Tax School Building Bonds, Series 1998	6.75%	$25,000,000	$25,000,000
Unlimited Tax School Building	7.25%	$36,805,000	$35,195,000

Bonds, Series 1999			
Unlimited Tax School Building Bonds, Series 2001	2.5% to 5.27%	$38,195,000	$36,695,000
Total		**$134,838,449**	**$102,071,970**

Source: BISD, Investments Office, August 2002.

The district uses the firm Ernst & Young to ensure compliance with federal arbitrage regulations. Arbitrage occurs when the district sells bonds and invests the funds from the bonds at a higher rate of interest and makes a profit. The federal government regulates the profit a district can make from this practice. The district uses a financial advisor to assist the district when it issues new debt and to provide assistance in determining the appropriate instruments to fund financing needs.

In March 2002, the district transferred $15.6 million from the debt service fund to the general fund. Although debt service funds are generally not allowed to be transferred to any other fund, the district received a legal opinion from bond counsel approving the transfer. The bond counsel approved the transfer because "the district should no longer be subject to the limitations contained in the election materials distributed (to the extent that such materials constituted a contract with the district's voters) with respect to the 1998 bond election because of the significant changes effected by the Texas Legislature with respect to school finance have addressed the initial concerns in 1998 concerning the district's interest and sinking tax rate and total ad valorem tax rate that the district's residents would have been obligated to pay with respect to the 1998 voted authorization."

The district transferred $13.2 million from the general fund to the debt service fund in 1998 and bought a repurchase agreement with Lehman Brothers. The transfer was made in order to keep the debt service tax rate stabilized at $0.2828 per $100 of assessed valuation after the passage of the 1997 bond referendum. The district promised the voters it would transfer the funds to reduce the effects of the bond passage on the tax rate in the information campaign related to the passage of the bond issue. The debt service tax rate for 2001-02 was $0.072 per $100 of assessed valuation, slightly more than 25 percent of the $0.2828 per $100 of assessed valuation in 1997-98. The $15.6 million represents the $13.2 million originally transferred from the general fund plus interest earned on the repurchase agreement.

FINDING

Voters approved a $100 million bond referendum in 1997 to provide funds for BISD to build and equip schools. BISD started moving toward the bond referendum in 1994 with the formation of a blue ribbon citizen committee to study the facility and financing needs of the district. Once the needs of the district were established, the district enlisted the services of a financial advisor to assist the district with the information campaign and election strategies.

The district conducted an information campaign to inform the citizens of the facility needs. The campaign used a variety of media to provide the citizens with information concerning the proposed bonds and the projects the bonds would be used to complete. The local newspaper published a number of articles concerning the condition of the existing facilities and provided school administrators opportunities to discuss the facility needs of the district.

Since the district cannot use its funds to advocate the passage of a bond referendum, a number of community members formed the Brownsville Children First Committee to support the bond passage. The committee raised money and published a number of advertisements urging voters to vote for the bond referendum. These advertisements included endorsements by community leaders, such as bank executives, doctors, state representatives and other professionals. The committee also published a resolution passed by the Brownsville Chamber of Commerce supporting the passage of the bond referendum.

Early voting was held at three permanent locations from October 24, 1997 through November 4, 1997, including Saturdays and Sundays. In addition to the three early voting locations, the district had early voting from two to nine in the evening at temporary locations. These locations included the high schools on October 27, the middle schools on October 28 and groups of the elementary schools on October 30, November 3 and November 4, 1997. The voters passed the referendum by a 2,514 to 470 vote.

BISD issued the bonds in three different series: the first in 1998, the second in 1999 and the third in 2001. The second and third issues qualified for the Instructional Facilities Allotment (IFA). The IFA is funding from the state to assist low wealth districts with the debt service payments on bond issues. In 2002, the district received $4.5 million from the state to assist the district in paying the principal and interest on the 1999 and 2001 series bonds. The district paid $5.8 million in principal and interest on these two bond series in 2002, and the IFA represented 78 percent of the expenditure. The IFA has allowed the district to minimize the impact of the bond payments on the tax rate.

COMMENDATION

The district used effective strategies to inform the public and provide opportunities for the public to vote to pass a $100 million bond referendum.

Chapter 7
FINANCIAL MANAGEMENT

This chapter reviews the financial management functions of the Brownsville Independent School District (BISD) in the following sections:

A. Fiscal Operations
B. Planning and Budgeting
C. Fund Balance
D. Tax Collections
E. External and Internal Audit
F. Accounting, Internal Control and Payroll

Effective financial management in school districts involves well thought out planning, budgeting and overall management of the district's resources to maximize financial performance. A district's ability to perform these tasks involves establishing solid relationships with its employees, vendors, funding agencies and the local community.

Financial management is most effective when resources are spent based on the district's established priorities in line with its stated goals and objectives. Internal controls must be in place and should be operating as intended. Financial information should be provided in a timely manner and presented in a format that is easily understood by all audiences.

BACKGROUND

School districts must maintain and operate effective financial management systems in a highly regulated environment. They must meet financial management requirements established by federal and state laws, rules and regulations. The Texas Education Agency's (TEA) *Financial Accountability System Resource Guide* (FASRG) outlines accounting and reporting requirements for Texas school districts. Internally developed policies and procedures, Generally Accepted Accounting Principles and the Governmental Accounting Standards Board (GASB) guidelines also affect school districts' financial management activities.

Texas school districts are required, under Texas law, to conduct school programs in accordance with the state constitution. The Texas Education Code (TEC) defines the specific requirements that school districts must comply with and authorizes the TEA to establish standards for all school districts.

The state's funding for public education is allocated through a system of statutory formulas known as the Foundation School Program (FSP). The FSP is designed to "provide substantially equal access to similar revenue per student at a similar tax effort, considering all state and local tax revenues of districts after acknowledging all legitimate student and district cost differences." To compensate for variations in local property wealth among school districts and to equalize overall school funding, the state reallocates funding to districts in inverse relation to property wealth.

The FSP consists of two tiers: Tier I and Tier II. These two tiers provide state aid to supplement local property taxes. The tiers also limit the total amount of property wealth per student that is spent on education in certain districts. Tier I "foundation" funding levels ensure that each district can provide a basic instructional program for all of its students. Under the Tier I formula, the state bases funding allotments on student attendance in weighted average daily attendance (WADA). WADA provides additional "weight" or funding to special needs students that participate in programs such as special education, compensatory education, bilingual education and gifted and talented programs. Tier I formulas also provide partial funding for school transportation. The state adjusts Tier I allotments for individual districts' property tax bases. Therefore, a district's property wealth factors significantly into the state funding formula. A district that cannot generate the entire Tier I allotment receives state aid to make up the difference.

Tier II funding, known as the guaranteed yield program, provides substantially equal access to funds to enrich the basic Tier I program. Districts may, but are not required to, levy a minimum maintenance and operations tax rate of 64 cents in Tier II. For each penny of such tax effort, the state guarantees a certain yield per weighted student. For 2001-02, the state guarantees that each penny of a district's Tier II tax effort will generate $25.81 per student in WADA. The wealth of the district determines the amount of state aid received in Tier II. Districts with property wealth below $258,100 per weighted student in 2001-02 will generate local revenue and the state will provide the difference between that amount and the amount guaranteed per WADA. Chapter 41 districts (districts with property wealth above $300,000 per WADA) must give to the state any amount generated by local revenue that exceeds the amount guaranteed per WADA. Gap districts (districts with property wealth at or above $258,100, but below $300,000 per WADA) will generate the Tier II yield entirely with local funds and will be able to retain all of the local funds generated. The state subjects districts with property wealth above $300,000 per WADA to the wealth equalization provisions of Chapter 41 of the Texas Education Code. Tier II funds can be used for any legal purpose other than capital outlay or debt service.

Senate Bill 4 of the 1999 Texas Legislature added a new component, Tier III funds, to the education funding formula. Tier III funds provide partial state funding for debt service requirements on previously issued bonds to local school districts.

The Texas Constitution authorizes local governments, including school districts, to levy property taxes. School property taxes represent nearly 60 percent of total property taxes levied in the state. Property taxes levied by school districts can have a significant impact on the amount of funding provided to individual districts by the state. School districts levy two categories of property taxes: maintenance and operations (M&O) and interest and sinking (I&S). Districts use M&O taxes to cover the routine operating costs of education and I&S taxes to pay debt service for financing building programs.

BISD receives revenue from local, state and federal sources. **Exhibit 7-1** summarizes the district's budgeted revenue breakdown over the last five years. Overall, the total revenues increased 25.8 percent between 1997-98 and 2001-02. Local revenues increased 56.5 percent, state revenues increased 20.1 percent and federal revenues increased 27.9 percent.

Exhibit 7-1
BISD Total Budgeted Revenue by Source
1997-98 through 2001-02

Revenue Source	1997-98	1998-99	1999-2000	2000-01	2001-02	Percent Change 1997-98 through 2001-02
Local and Intermediate	$32,137,136	$35,874,780	$37,774,984	$43,702,141	$50,293,383	56.5%
State	$180,879,843	$178,871,630	$199,377,263	$200,212,125	$217,295,710	20.1%
Federal	$15,715,521	$16,281,393	$16,829,731	$18,436,170	$20,105,689	27.9%
Total	**$228,732,500**	**$231,027,803**	**$253,981,978**	**$262,350,436**	**$287,694,782**	**25.8%**

Source: Texas Education Agency (TEA), Public Education Information Management System (PEIMS), 1997-98 through 2001-02.

On average, Texas school districts receive about 55 percent of their revenues from local/other taxes, 42 percent from the state and 3 percent from federal sources. BISD receives the majority of its revenue, 76 percent, from state sources. **Exhibit 7-2** illustrates the breakdown of budgeted revenue by source for the district in 2001-02.

Exhibit 7-2
BISD Budgeted Revenue Sources
as a Percentage of Total Revenues
2001-02
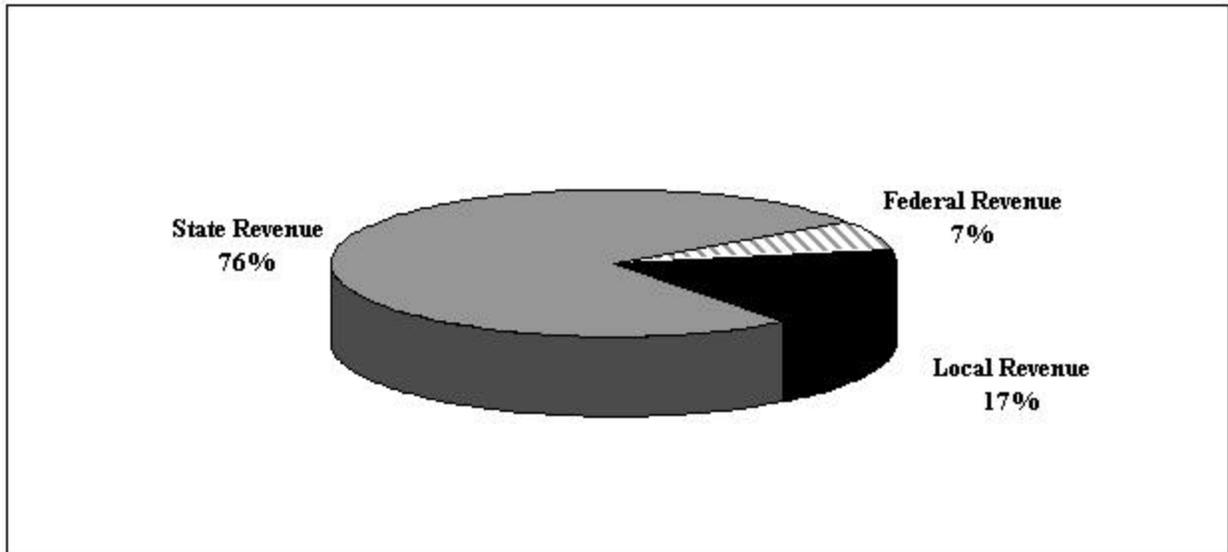
Source: TEA, PEIMS 2001-02.

BISD receives a higher percentage of its total revenues from the state than four peer districts. In terms of local revenue sources, BISD receives a much lower percentage of its total revenue from local sources than four of its peers, with Laredo receiving the lowest. **Exhibit 7-3** presents 2001-02 budgeted revenues by source for BISD and its peers. BISD exceeds the state averages for federal and state funding and is substantially below the state average in terms of the percentage of total revenues received from local sources.

Exhibit 7-3
BISD, Peer Districts and Statewide Average Budgeted Revenue Sources
as a Percentage of Total Revenues
2001-02

District	Local/Other Revenue	Percentage of Total	State Revenue	Percentage of Total	Federal Revenue	Percentage of Total
Brownsville	**$50,293,383**	**17.5%**	**$217,295,710**	**75.5%**	**$20,105,689**	**7.0%**
Corpus Christi	$110,827,520	44.8%	$126,634,636	51.2%	$9,828,100	4.0%
Laredo	$23,828,428	16.5%	$112,277,983	77.6%	$8,544,500	5.9%
North East	$276,003,041	71.2%	$102,173,622	26.4%	$9,261,749	2.4%
Plano	$438,010,581	93.5%	$27,842,388	5.9%	$2,692,205	0.6%
Ysleta	$64,592,369	23.0%	$198,295,002	70.4%	$18,537,798	6.6%
State	**$15,436,127,911**	**55.0%**	**$11,754,404,482**	**41.8%**	**$897,188,779**	**3.2%**

Source: TEA, PEIMS, 2001-02.

The state sends a proportional amount of revenue to each district based on a district's property values. Districts with greater property wealth per pupil receive less from the state because they generate more property taxes, while districts with lower property value per pupil receive more from the state. **Exhibit 7-4** compares the property value per pupil for BISD and its peer districts between 1997-98 and 2001-02. Although BISD's property values increased 34.6 percent over the time period reviewed, it remains the poorest district of its peers in terms of its property value per pupil, with the exception of Laredo ISD.

Exhibit 7-4
Property Value Per Pupil
BISD and Peer Districts
1997-98 through 2001-02

District	1997-98	1998-99	1999-2000	2000-01	2001-02	Percent Change over Period
Brownsville	**$49,945**	**$54,754**	**$58,934**	**$62,610**	**$67,201**	**34.6%**
Corpus Christi	$142,013	$147,772	$154,658	$160,269	$166,307	17.1%

Laredo	$53,257	$54,988	$55,907	$57,520	$56,936	6.9%
North East	$233,810	$241,205	$250,226	$262,853	$280,273	19.9%
Plano	$380,560	$415,571	$456,383	$487,416	$523,561	37.6%
Ysleta	$82,401	$84,505	$81,482	$88,272	$91,033	10.5%

Source: TEA, Academic Excellence Indicator System (AEIS), 1997-98 through 2000-01 and PEIMS 2001-02.

Enrollment at BISD has increased over the past two years with a 4-percent increase in 2001-02 as shown in **Exhibit 7-5**.

Exhibit 7-5
BISD's Student Enrollment
1997-98 through 2001-02

Year	Enrollment	Percent Increase/ (Decrease) From Previous Year
1997-98	40,324	N/A
1998-99	40,262	(0.2%)
1999-2000	40,195	(0.2%)
2000-01	40,898	1.7%
2001-02	42,541	4.0%

Source: TEA, AEIS, 1997-98 through 2000-01 and PEIMS, 2001-02.

Exhibit 7-6 compares the district's total budgeted expenditures to those of its peer districts in terms of percent of total expenditures by function per student. BISD dedicates the lowest percent of its budgeted expenditures to instruction among its peers at 47.5 percent with the exception of Plano ISD. Instructional expenditures statewide represent approximately 51 percent of total expenditures.

Exhibit 7-6
Total Budgeted Expenditures by Function Per Student
BISD and Peer Districts
Fiscal Year Ending August 31, 2002

Function	Brownsville		Corpus Christi		Laredo		North East		Plano		Ysleta	
Instruction	$3,614	47.5%	$3,412	53.9%	$3,393	54.5%	$3,937	52.9%	$4,110	40.9%	$3,318	54.6%
Instructional Related Services	288	3.8%	127	2.0%	169	2.7%	192	2.6%	309	3.1%	138	2.3%
Instructional Leadership	94	1.2%	118	1.9%	91	1.5%	54	0.7%	50	0.5%	80	1.3%

School Leadership	**418**	**5.5%**	358	5.7%	375	6.0%	423	5.7%	349	3.5%	330	5.4%
Support Services Students	**333**	**4.4%**	287	4.5%	334	5.4%	351	4.7%	303	3.0%	250	4.1%
Student Transportation	**190**	**2.5%**	130	2.1%	77	1.2%	190	2.5%	97	1.0%	110	1.8%
Food Services	**501**	**6.6%**	273	4.3%	328	5.3%	279	3.7%	280	2.8%	286	4.7%
Co-curricular/ Extracurricular Activities	**222**	**2.9%**	127	2.0%	87	1.4%	125	1.7%	93	0.9%	111	1.8%
Central Administration	**267**	**3.5%**	182	2.9%	202	3.3%	194	2.6%	192	1.9%	168	2.8%
Plant Maintenance and Operations	**703**	**9.2%**	628	9.9%	549	8.8%	616	8.3%	738	7.3%	595	9.8%
Security and Monitoring Services	**65**	**0.9%**	45	0.7%	60	1.0%	48	0.6%	51	0.5%	66	1.1%
Data Processing Services	**41**	**0.5%**	93	1.5%	67	1.1%	34	0.5%	114	1.1%	125	2.1%
Total Budgeted Operating Expenditures	**$6,735**	**88.5%**	**$5,780**	**91.4%**	**$5,732**	**92.2%**	**$6,443**	**86.5%**	**$6,686**	**66.5%**	**$5,577**	**91.8%**
Total Budgeted Non-Operating Expenditures	**$873**	**11.5%**	**$546**	**8.6%**	**$488**	**7.8%**	**$1,007**	**13.5%**	**$3,364**	**33.5%**	**$496**	**8.2%**
Total Budgeted Expenditures	**$7,608**	**100.0%**	**$6,326**	**100.0%**	**$6,220**	**100.0%**	**$7,450**	**100.0%**	**$10,050**	**100.0%**	**$6,073**	**100.0%**

Source: TEA, PEIMS, 2001-02
Note: Totals may not add to 100 percent due to rounding.

Exhibit 7-7 breaks out the budgeted expenditures by object code as a percentage of the total for BISD and its peer districts. BISD budgets 73.3 percent of its total expenditures for payroll. Generally, payroll expenditures make up approximately 80 percent or higher of a district's budget. BISD has a fairly high portion of its budget allocated for capital outlay.

Exhibit 7-7
BISD vs. Peer Districts
Budgeted Expenditures for All
Funds by Object Code Description
2001-02

District	Payroll	Contracted Services	Supplies	Other Operating	Debt Service	Capital Outlay

Brownsville	**73.3%**	**5.9%**	**7.3%**	**2.3%**	**3.8%**	**7.3%**
Corpus Christi	77.7%	6.2%	5.8%	2.1%	6.7%	1.5%
Laredo	81.1%	5.4%	4.5%	1.1%	7.0%	0.8%
North East	75.4%	5.9%	4.7%	0.9%	11.6%	1.5%
Plano	53.8%	28.0%	4.4%	1.5%	12.0%	0.3%
Ysleta	78.6%	6.9%	5.5%	1.4%	4.5%	3.1%

Source: TEA, PEIMS, 2001-02.
Note: Totals may not add to 100 percent due to rounding.

Enrollment has increased by 5.5 percent since 1997-98. The district budgeted to spend $7,608 per student in 2001-02. This represents an 18.1 percent increase during the five-year period reviewed. **Exhibit 7-8** compares actual annual per student expenditures by function between 1997-98 and 2000-01. Also presented is budgeted 2001-02 per student expenditures by function.

Exhibit 7-8
BISD Functional Expenditures Per Student
1997-98 through 2001-02

Description	1997-98 (Actual)	1998-99 ((Actual)	1999-2000 ((Actual)	2000-01 ((Actual)	2001-02 ((Budget)	Percent Change (1997-98 through 2001-02
Students	40,324	40,262	40,195	40,898	42,541	5.5%
Instruction	$3,401	$3,483	$3,805	$3,815	$3,614	6.3%
Instructional Related Services	$208	$265	$286	$316	$288	38.5%
Instructional Leadership	$92	$94	$102	$104	$94	2.2%
School Leadership	$287	$300	$327	$361	$418	45.6%
Support Services - Student	$307	$324	$351	$371	$333	8.5%
Student Transportation	$133	$151	$162	$187	$190	42.9%
Food Services	$358	$395	$403	$435	$501	39.9%
Co-/Extracurricular Activities	$131	$142	$159	$180	$222	69.5%
Central Administration	$171	$196	$195	$214	$267	56.1%
Plant Maintenance/Operations	$533	$542	$599	$666	$703	31.9%
Security and Monitoring Srvcs.	$43	$48	$54	$60	$65	51.2%
Data Processing Services	$30	$36	$35	$36	$41	36.7%
Community Services	$46	$48	$49	$48	$13	(71.7%)
Facilities Acquisition	$3	$7	$1	$2	$12	300.0%

Debt Service & Capital Outlay	$700	$655	$797	$1,240	$848	21.1%
Total	**$6,443**	**$6,685**	**$7,324**	**$8,034**	**$7,608**	**18.1%**

Source: TEA, PEIMS, 1997-98 through 2001-02. Note: Totals may not add to 100 percent due to rounding.

The district's allocation of expenses toward instruction and instructional related services has decreased since 1999-2000. In that year, the district dedicated 55.8 percent of every dollar expended. In 2001-02, only 51.3 percent of expenditures were dedicated to instruction and instructional related services. **Exhibit 7-9** presents the percent breakdown of actual expenditures from 1999-2000 through 2000-01 and 2001-02 budgeted expenditures by function.

Exhibit 7-9
BISD Expenditures by Function
and Percentage of Total by Function
1999-2000 through 2001-02

Function	1999-2000 Actual	Percent of Total	2000-01 Actual	Percent of Total	2001-02 Budget	Percent of Total
Instruction (11, 95)	$152,933,275	51.9%	$156,022,692	47.5%	$153,725,582	47.5%
Instructional Related Services (12, 13)	$11,511,509	3.9%	$12,909,798	3.9%	$12,231,733	3.8%
Instructional Leadership (21)	$4,081,849	1.4%	$4,241,602	1.3%	$4,008,460	1.2%
School Leadership (23)	$13,123,846	4.5%	$14,769,754	4.5%	$17,795,055	5.5%
Support Services (31, 32, 33)	$14,109,259	4.8%	$15,155,528	4.6%	$14,163,858	4.4%
Student Transportation (34)	$6,513,909	2.2%	$7,629,596	2.3%	$8,098,077	2.5%
Food Services (35)	$16,207,828	5.5%	$17,789,670	5.4%	$21,319,508	6.6%
Co-/Extracurricular Activities (36)	$6,398,404	2.2%	$7,362,392	2.2%	$9,437,186	2.9%
Central Administration (41, 92)	$7,822,089	2.7%	$8,764,079	2.7%	$11,351,058	3.5%
Plant Maintenance /Operations (51)	$24,075,718	8.2%	$27,240,928	8.3%	$29,897,629	9.2%
Security and Monitoring Srvcs (52)	$2,153,336	0.7%	$2,458,613	0.7%	$2,750,680	0.8%
Data Processing Services (53)	$1,421,617	0.5%	$1,452,165	0.4%	$1,746,968	0.5%
Other *	$34,054,820	11.6%	$52,779,298	16.1%	$37,125,505	11.5%
Total	**$294,407,459**	**100.0%**	**$328,576,115**	**100.0%**	**$323,651,299**	**100.0%**

Source: TEA, PEIMS, 1999-2000 through 2001-02. Note: Totals may not add to 100 percent due to rounding.
*Other includes any operating expenditures not listed above and all non-operational expenditures such as debt service, capital outlay and community and parental involvement services.

Chapter 7
FINANCIAL MANAGEMENT

A. FISCAL OPERATIONS

School district financial managers collect, analyze and provide information to district decision makers. Successful financial operations require qualified personnel with an adequate separation of duties, an accounting system that provides timely and useful information on which to base operating decisions and comprehensive policies and procedures that ensure proper management of the district's fiscal resources.

A district's fiscal operations include the functions of collection, disbursement and accounting of local, state and federal funds. An effective fiscal operation institutes detailed policies and internal controls to process the district's daily business transactions efficiently while providing accurate, complete and timely information to the administration and board, facilitating effective decision-making.

The chief financial officer (CFO) oversees the finance and accounting function at BISD under the direct supervision of the superintendent. The most recent CFO was with the district since August 20, 2001 and was responsible for a number of departments in the district including Budget, Finance, Investments, Payroll, Purchasing, Facilities and Warehouse/Textbooks/Fixed Assets. The CFO resigned shortly after the review team's site visit, leaving the position vacant.

FINDING

The Finance Department is overstaffed, not logically organized and has several positions with titles that do not clearly describe job functions and responsibilities. For example, there are three positions that are titled finance coordinators. These positions are supervisory positions responsible for various areas in the Finance Department.

There are currently 61 employees in the Budget, Finance and Payroll Departments, including the 10 bookkeepers located in the high schools and middle schools that account for the school motivational and student activity funds. Motivational funds are the principal's discretionary funds that can be used for expenses such as staff meeting refreshments, continuing education and conferences. The student activity funds are funds that are raised by student organizations and clubs.

Of the 61 total employees, one employee is part-time and the remaining 60 are full-time employees. **Exhibit 7-10** illustrates the current organizational structure of the Budget, Finance and Payroll Departments.

Exhibit 7-10
BISD Budget, Finance and Payroll Departments
2002 Organizational Chart
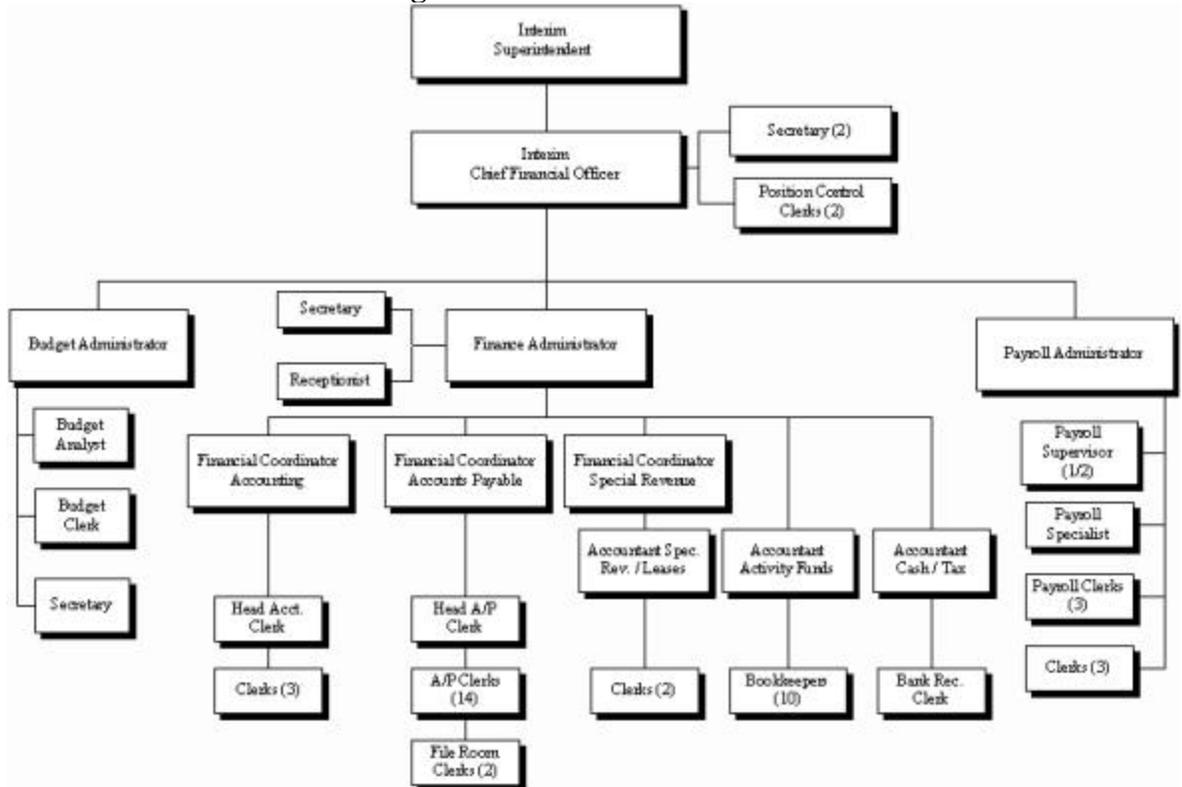
Source: BISD Finance Department, March 2002.

The Finance administrator position currently has five supervisors reporting to it: three financial coordinators and two accountants. During the 1994 Texas School Performance Review (TSPR), the district had six accountant supervisors. A recommendation in the 1994 report was to reorganize the Finance Department and manage this department with four accounting supervisors rather than six. Although the district has eliminated three accountant supervisors since the 1994 report, it replaced two of the positions with two lower pay level accountants.

Exhibit 7-11 compares the number of employees BISD has in each department with its peers. BISD has more accounts payable staff than its peers, with the exception of North East ISD, which has 25 percent more students, but only one more accounts payable employees. Comparing BISD's average number of employees with peer districts, the accounts payable division is overstaffed by approximately eight employees.

Although the comparisons show that the budget department is understaffed by two positions, some of its peers also include position control clerks in its number, while the two BISD position control clerks currently report directly to the CFO.

Exhibit 7-11
Number of Employees by Department for
BISD and Peers

District	Accounts Payable	Payroll	Budget	Enrollment	Staff
Brownsville	**18**	**9**	**4**	**42,541**	**6,555.2**
Corpus Christi	7	7	1	39,383	5,818.3
Laredo	6	5	*n/a	23,188	5,487.4
North East	19	10	14	53,030	6,351.3
Plano	6	6	2	48,944	5,420.7
Ysleta	11	9	5.5	46,742	6,260.4
Average Peers	**10**	**7**	**5**	**42,257**	**5,867.6**

Source: BISD Organizational Chart, March 2002, TSPR reports for Laredo ISD (LISD) and Ysleta (YISD)
and TSPR surveys of North East ISD (NEISD) and Corpus Christi ISD (CCISD).
*The chief financial officer along with the accounting staff performs the budget function.

At the time of the site visit, the accounts payable staff had three vacant accounts payable clerk positions. One of these positions has been vacant for over a year and the remaining two positions have been vacant for two weeks. As of that date, the accounts payable staff has continued to get payments out in a timely manner and has required minimal overtime. Since the site visit, the district recently filled two of the vacant positions.

BISD is in the process of replacing its financial and human resources software. Many organizations take this opportunity to look for software applications with features that will enhance the efficiency of business processes and allow it to reduce staffing.

Prior to March 2002, the area superintendent for Human Resources was responsible for the position control function, but this functional responsibility was moved to the CFO when the new Payroll administrator was transferred from Human Resources. The district has had difficulties keeping the position control reporting accurate and current for several

years. Many of the problems stem from the employees assigned to this position not fully understanding the position control function. Sufficient effort had not been made to stay current and hold school and department administrators accountable for notifying the position control clerks of changes that occurred at the schools or departments. Position control reporting is an essential tool for a district to keep current with the number of employees by type of position and location to ensure that the district remains within its adopted budget. Salaries and wages are the district's largest budgeted expenditures. The 2001-02 budgeted salaries and wages are 73.3 percent of total expenditures. It is critical that the district keeps abreast of how much it is spending to ensure that it remains in line with its budget. **Exhibit 7-12** compares the districts salaries and wages budgeted amounts with actual expenditures for salaries and wages from 1997-98 through 2000-01. The district's actual salaries and wage expenditures exceeded the budgeted amounts in every year in a range of $4 million to $16 million, which is a percentage increase from 2.4 percent to 7.5 percent.

Exhibit 7-12
BISD Budgeted v. Actual Salaries and Wages
1997-98 through 2000-01

Object Description	1997-98	1998-99	1999-2000	2000-01
Budgeted Salaries and Wages	$184,018,742	$186,441,810	$203,954,162	$213,272,143
Actual Salaries and Wages	$188,494,333	$198,897,299	$216,541,411	$229,327,070
Difference	($4,475,591)	($12,455,489)	($12,587,249)	($16,054,927)
Percentage Increase from Budget	2.4%	6.7%	6.2%	7.5%

Source: TEA, PEIMS, 1997-98 through 2000-01.

The district issued its first position control report to principals and department heads on September 13, 2002. The principals and department heads were requested to verify that the employees on the report were working at their location and had the correct job assignment. If there were any discrepancies, the principals and department heads were required to mark any corrections on the report and attach supporting documentation to justify the change. The principals and department heads were required to sign and return the verified position control reports to the position control clerks by September 17, 2002.

Recommendation 57:

Restructure the Budget and Finance Departments, reduce staff and clearly define job titles.

The Finance coordinator of accounting should assume the responsibility of the cash and tax accounting and activity funds accounting functions. In addition, the Finance coordinators should be renamed accounts payable supervisor, special revenue supervisor, and accounting supervisor, and the accountants should be renamed special revenue / leases accountant, cash / tax accountant and activity funds accountant. The proposed change lays out a logical organizational structure, clarifies the position titles in line with the duties performed, and maintains the segregation of duties the district currently has in place.

Seven accounts payable clerks and one file room clerk should be eliminated and the two position control clerks should report to the Budget administrator. The Finance administrator and the accounts payable supervisor should review the current accounts payable process to identify ways to streamline the division.

Exhibit 7-13 illustrates the proposed organizational chart for the Budget, Finance and Payroll Departments.

Exhibit 7-13
BISD Budget, Finance and Payroll Departments
Proposed Organizational Chart
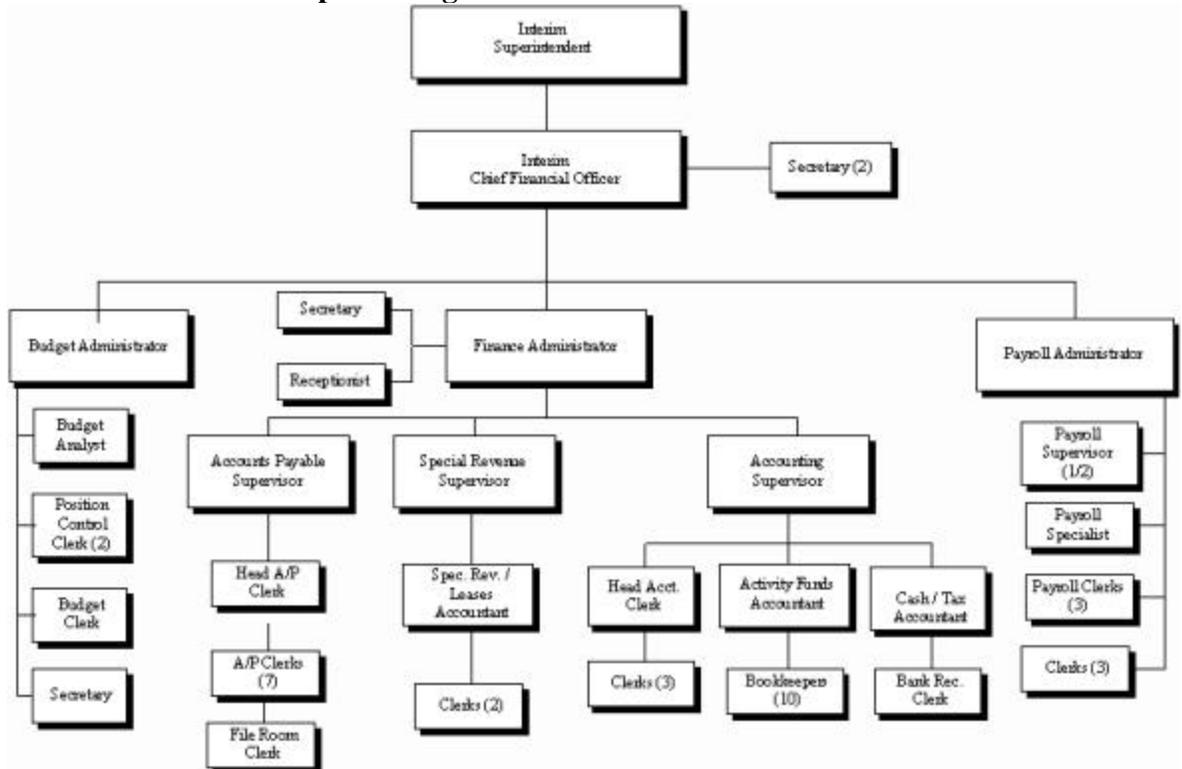
Source: Gibson Consulting Group, Inc., September 2002.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The CFO, Finance administrator and supervisor of accounts payable and a Human Resources representative review the accounts payable division to develop a plan to restructure the Finance department, clarify the job titles and descriptions, and eliminate eight positions.	March 2003
2.	The CFO submits the revised organizational chart, job title changes and plan for eliminating eight positions in accounts payable to the superintendent for approval.	March 2003
3.	The superintendent requests that the board approve the revised organizational chart. This includes approving the job title changes and the elimination of the eight positions; seven accounts payable clerks and one file room clerk.	May 2003
4.	The board approves the revised organizational chart including	May 2003

	the job title changes and the elimination of the eight positions.	
5.	The CFO and Finance administrator work with the Human Resources staff to eliminate the eight positions.	June 2003 - August 2003
6.	The CFO and Finance administrator develop the new job titles and job descriptions and inform staff of the revised organizational chart.	September 2003
7.	The position control clerks begin reporting to the Budget administrator.	September 2003

FISCAL IMPACT

Eliminating seven accounts payable clerk positions will result in annual savings of $167,916. These savings are calculated by taking the average annual salary for the accounts payable clerks employees, paying them for 227 days and adding annual benefits ([$18,308 annual salary x 1.12 variable benefits] + $3,483 fixed benefits x 7 positions = $167,916).

Eliminating one file room clerk position will save $20,355 annually. These savings are calculated by taking the average annual salary for file room clerks and adding annual benefits ([$15,064 annual salary x 1.12 variable benefits] + $3,483 fixed benefits = $20,355).

The district will save $188,271 ($167,916 + $20,355) annually.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Restructure the Budget and Finance Departments, reduce staff and clearly define job titles.	$188,271	$188,271	$188,271	$188,271	$188,271

Chapter 7
FINANCIAL MANAGEMENT

B. PLANNING AND BUDGETING (PART 1)

A school district's budget is a critical tool that enables a district to adequately maintain and control its financial resources. School administrators, departme nt heads, teachers and community members should be involved in the budgeting process, as well as the central administration and school board. The budget should reflect the overall goals and objectives of the district's long-range strategic plan. Given the scarcity of resources available to a school district, it is critical that the district budget its dollars effectively. Sound fiscal management entails forecasting a reasonable but conservative revenue number and a reasonable but aggressive expenditure numb er to ensure that adequate funds are available. It also requires that management prioritize programs to "get the best bang for the buck". No district has the financial resources to implement every available program.

In the budget planning process, districts should consider general educational goals, specific program goals and alternatives for achieving program goals. Budget planning and evaluation should be a continuous process and should constitute a part of each month's activities. Ideally, the budget should:

- present a comprehensive forecast of all expenditures and revenues of the district based on the specific educational needs and plans of the district;
- serve as an overall picture of the district's operation;
- depict the educational plans of the district with a definite statement of goals, policies and curriculum plans;
- establish spending plans that include a translation of the educational plans into dollars and cents; and
- present financing plans that include proposed means and sources for securing adequate revenue to meet school program needs.

A school district must first estimate its revenues to determine the amount of funds available for the budget year. School districts receive revenues from the federal and state governments and local taxpayers. Federal revenues can fluctuate significantly based on changes in the federal budget and districts must take great care to monitor the federal funds that will be available. State revenues are based on a variety of factors that must be estimated annually, the most critical of which is student attendance. The estimate includes both not only the total projected number and type of students. The special weighting factors in the state funding formula

provide different funding levels for students with special needs. It is also important that the district have a good estimate of the appraised value of property in the district so that the funding received from local taxpayers can be estimated.

The next step requires the district to estimate the expenditures for the budget year. Although the TEC states that the superintendent is responsible for preparing the budget, the preparation phase should include opportunities for staff and community members to express their opinions.

The district-level and school-level Site-Based Decision-Making Committees (SBDMC) must be involved in preparing a budget for each school if the district uses an allocation process for staffing, supplies and other budgeted expenditures based on the number of students enrolled. This committee can assist district decision-makers in determining how to allocate expenditures to meet the individual needs of each school. If the district uses a budget process where funds are requested by category of need, it must involve the SBDMC in formulating and prioritizing requests in line with the school's needs.

Due to limited resources, districts often find they can fund only their highest priorities. During the development process, the district also must account for the priorities established in its Campus Improvement Plans (CIP) and District Improvement Plan (DIP). All departments must establish their needs based on the services they plan to provide. Once all the necessary information is compiled, the preliminary budget is ready for the presentation phase.

The presentation steps should provide opportunities for the administration and board to review and discuss the revenue and expenditure estimates and their underlying assumptions. If estimated revenues are not sufficient to pay for the estimated expenditures, the presentation phase should include options for increasing revenue, reducing expenses or using a portion of the undesignated fund balance to arrive at a balanced budget. The fund balance should be used only for one-time expenditures such as capital improvements and not to fund recurring expenditures such as employee raises. The presentation phase should include opportunities for district employees to provide input into the discussions. Finally, the presentation phase should specifically allow for public input on the budget. The TEC requires the district to conduct a public budget hearing; the board can adopt the budget only after this hearing.

The final step in the budget process is adoption, which must occur before the district can spend any funds. Once adopted, the budget provides the district with legal authority for its expenditures. The budget controls expenditures and expenditures cannot exceed the budget. If expenditures

will exceed the budget, the district must prepare, present and adopt a budget amendment before the expenditure is made.

The Texas Association of School Boards (TASB) presented a flowchart of a sample budget process in its October 2001 fall conference, as shown in **Exhibit 7-14**. This flowchart details the steps that should be included in any district budget process. It can be easily customized to fit the unique requirements of any Texas school district.

Exhibit 7-14
TASB

Sample Budget Process

Board of Trustees	Staff

Complete Annual Strategic Plan

Adjust Budget Development Calendar	←	Develop Draft Budget Development Calendar

Develop Assumptions for Property Values, Target Teacher/Pupil Ratios, Growth Rate, and $/Student

Review Assumptions for Use in Budgeting

Adopt Budget Priorities Based on Strategic Plan	←	Provide Preliminary Revenue and Expenditure Estimates

Approve District and Campus Performance Objectives	→	Develop District and Campus Improvement Plans Including New Program and Improvement Initiative Proposals

Develop Capital Outlay Requests

Review District and Campus Improvement Plans with Fiscal Notes	←	Develop Staffing Plan and Proposed Salary Schedule

Adopt Staffing Plan and Salary Schedule, Approve New Programs and Improvement Initiatives, Review Capital Outlay Requests, Review Updated Revenue and Expenditure Estimates	←	Update Budget Aggregates

Review Major Object Budget	←	"Fine Tune" Budget to Major Object Level Personnel Costs, Operational Costs and Capital Outlay

Review Latest Refined Budget, Tax and Revenue Estimates, Provide Direction for Adjustments	←	Continued Refinement of Budget and Tax Estimates

Budget Hearing Review Tax Rate Required Provide Direction for Adjustments	←	Receive Certified Tax Roll Calculate Effective and Rollback Tax Rates	**July 25** Certified Appraisal Roll Received

		Before Budget hearing, publish "Notice of Public Meeting to Discuss Budget and Proposed Tax Rate"	**August 20** Budget Must Be Prepared

Adopt Budget		

Adopt Tax Rate		Make Final Adjustments to Budget	**August 31** Budget Must Be Adopted

		Mail Tax Statements	**September 30** Tax Rate Must Be Adopted

Source: Texas Association of School Boards, 2001.

FINDING

The Budget Department at BISD has four staff members; a Budget administrator, an interim Budget analyst, a Budget entry clerk and a secretary. The department is responsible for analyzing historical trends, setting the budget calendar, developing the starting budget, sending budget worksheets to schools and departments, conducting budget workshops and entering the approved budget into the accounting system. The 2002-03 budget calendar is outlined in **Exhibit 7-15**.

Exhibit 7-15
BISD Budget Calendar
2002-03 Budget

Scheduled Date	Activity
January - February 2002	Review the following: • Mission Statement • District Strategic Plan • Student Projections • Revenue Projections • Per Pupil Allotments • Staffing Formulas • All Fringe Benefits
February 25, 2002	Budget Packets sent to the following: • Schools • Departments • Funds
March 18-28, 2002	Campus Teacher Projection Hearings
April 2 -12	Fund Budget Hearings - The Proposed Budget for Funds Department Budget Hearings - The Proposed Budget for Departments Budget forms due from the respective immediate supervisor of principals, department heads and other program administrators
May 31, 2002	Budget for the district should be prepared in a draft form
June 17, 2002	School board Budget Committee workshop
June 24, 2002	School board Budget Committee workshop
July 31, 2002	School board Budget Committee workshop - Discussion of

	Proposed Budget and salary increase for classified and certified personnel and supplemental duty salary schedule
August 9 or 10, 2002	"Notice of Public Meeting to Discuss Budget and Proposed Tax Rate" published in the Brownsville Herald
August 17, 2002	School board Budget Committee meeting
August 20, 2002	Regular board called board meeting
August 27, 2002	Special Called Board meeting • Adoption of Budget • Adoption of Tax Rate

Source: BISD Budget Department, September 2002.

The district's budget calendar enables the district to develop and obtain board approval of its annual budgets in an orderly and timely manner.

COMMENDATION

The district's budget calendar helps ensure a timely development of its annual budget.

FINDING

The district does not effectively conduct an analysis of historical expenditure trends when developing the annual budget. There has been a 17.5 percent increase in expenditures dedicated to instruction from 1997-98 through 2001-02. However, instructional expenditures have increased the least in comparison with all other functions. Expenditures for the co-curricular/extracurricular activities function have increased the most at 66.4 percent. Instructional related services have increased 62.4 percent. However, in 2001-02, instructional related services expenditures accounted for only 7.4 percent of all instructional expenditures. Central administration and school leadership expenditures have sharply increased by 43.6 percent and 54.5 percent respectively. Total budgeted operating expenditures increased by 29.1 percent. **Exhibit 7-16** shows a breakdown of BISD's budgeted expenditures by function between 1997-98 and 2001-02.

The instruction expenditures include teacher salaries and all activities dealing directly with the interaction between teachers and students, including computer-assisted instruction. Non-operating expenditures

include those expenditures dedicated to community service, facilities acquisition and construction, capital outlay and debt service. Non-operating expenditures have increased by 86.4 percent from 1997-98 though 2001-02. This increase is primarily due to the construction of new school buildings and the renovation of existing school buildings.

Total budgeted expenditures increased by 33.9 percent between 1997-98 and 2001-02 while the enrollment increased by only 5.5 percent. Per pupil expenditures increased 26.9 percent, from $5,996 to $7,608.

Exhibit 7-16
BISD Budgeted Total Expenditures by Function
1997-98 through 2001-02

Function	1997-98	1998-99	1999-2000	2000-01	2001-02	Percent Change Over 5 Years
Instruction	$130,803,793	$127,025,027	$138,482,384	$142,040,570	$153,725,582	17.5%
Instructional Related Services	7,531,335	10,786,723	11,345,202	11,451,634	12,231,733	62.4%
Instructional Leadership	2,581,105	3,045,874	3,271,583	3,437,142	4,008,460	55.3%
School Leadership	11,516,163	12,314,562	13,384,422	14,513,338	17,795,055	54.5%
Support Services Students	10,513,333	11,109,374	12,107,758	12,766,231	14,163,858	34.7%
Student Transportation	5,639,861	6,389,916	6,704,199	6,877,986	8,098,077	43.6%
Food Services	15,425,609	16,151,753	16,913,829	18,970,671	21,319,508	38.2%
Co-curricular/ Extracurricular Activities	5,670,115	5,943,626	6,671,758	7,295,640	9,437,186	66.4%
Central Administration	7,903,213	8,475,373	8,883,277	9,791,074	11,351,058	43.6%
Plant Maintenance and	21,210,028	22,408,745	23,588,483	24,913,043	29,897,629	41.0%

Operations						
Security and Monitoring Services	1,738,241	1,953,448	2,087,194	2,434,027	2,750,680	58.2%
Data Processing Services	1,334,854	1,215,501	1,632,792	1,656,981	1,746,968	30.9%
Total Budgeted Operating Expenditures	**$221,867,650**	**$226,819,922**	**$245,072,881**	**$256,148,337**	**$286,525,794**	**29.1%**
Community Services	$336,478	$403,592	$415,247	$557,298	$551,109	63.8%
Facilities Acquisition & Construction	0	0	0	0	489,992	100.0%
Capital Outlay & Debt Service	19,580,780	19,812,739	22,340,500	22,466,072	36,084,404	84.3%
Total Budgeted Non-Operating Expenditures	**$19,917,258**	**$20,216,331**	**$22,755,747**	**$23,023,370**	**$37,125,505**	**86.4%**
Total Budgeted Expenditures	**$241,784,908**	**$247,036,253**	**$267,828,628**	**$279,171,707**	**$323,651,299**	**33.9%**
Student Enrollment	40,324	40,262	40,195	40,898	42,541	5.5%
Total Expenditures Per Student	**$5,996**	**$6,136**	**$6,663**	**$6,826**	**$7,608**	**26.9%**

Source: TEA, PEIMS, 1997-98 through 2001-02.

The breakdown of expenditures over the last five years indicates that the district is not evaluating its expenditures in terms of what proportion of total expenditures are going to programs outside the classroom. Principals told the review team that they did not believe that the budget was driven by educational goals. Although the budget calendar allocates time to perform an analysis of historical expenditures, the analysis is not having

an impact on increasing the percent of funds going to the classroom. The trend shows the opposite result is occurring and that dollars are moving out of the classroom.

Although extracurricular activities can enhance the overall educational experience of students, it must be kept in perspective. The primary focus of public education in Texas must be providing the highest quality, cost-effective education available to its children. A 66.4 percent increase in expenditures related to extracurricular activities is significant when one considers that instruction expenditures only increased 17.5 percent. Education dollars are not being allocated properly. **Exhibit 7-17** presents the percentage of the district's total budgeted expenditures that have been allocated to instruction, instruction related services and extracurricular activities from 1997-98 through 2001-02. The percentage of the budget allocated to instruction expenditures has continued to drop while the allocation for extracurricular expenditures has grown.

Exhibit 7-17
Percent of Total Budgeted Expenditures
1997-98 through 2001-02

	1997-98	1998-99	1999-2000	2000-01	2001-02
Instruction	54.1%	51.4%	51.7%	50.9%	47.5%
Instruction Related Services	3.1%	4.4%	4.2%	4.1%	3.8%
Cocurricular/Extracurricular	2.3%	2.4%	2.5%	2.6%	2.9%

Source: TEA, PEIMS, 1997-98 through 2001-02.

It is important to review historical expenditures when developing the budget and identify any trends that should be closely monitored or reversed. In reviewing the actual expenditure trends, any misallocation of monies can be identified and corrected. Kerrville ISD has an extremely thorough budget process that involves the key decision makers throughout the entire process. Key budget drivers are identified and the budget is prepared in accordance. District management with the assistance of school administrators and department heads review all historical expenditures to determine where any cuts can be made without having a negative impact on programs.

Recommendation 58:

Annually analyze historical expenditures early in the budget process and establish budget targets to increase funding percentages for instructional categories.

If the emphasis on spending continues to move away from the classroom, academic performance will suffer especially in light of the new more rigorous Texas Assessment of Knowledge and Skills tests that begin in 2002-03. The district must review historical expenditures, not only the dollar amount of the expenditures, but also the dollar amount as a percentage of the total. If one category is out of line, such as extra-curricular activities, the district must make an adjustment. The priority has to be the classroom teachers and the students.

The district should establish a budget target for each category of expenditures. The target should involve two components; the percentage of the total budget that should be allocated to each function and the percent increase over time allocated to each function. If the district closely monitors the targets, it can manage its expenditures and ensure that the dollars are going where they are most needed, the classroom.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The board establishes a recommended target for each expenditure category.	March 2003
2.	The superintendent and Budget administrator prepare a memo for all school administrators, department heads and program administrators informing them of the new targets. During the budget workshops, these targets will be explained in further detail.	April 2003
3.	The Budget administrator reviews the preliminary budgets to ensure that the targets have been met.	June 2003
4.	The Budget administrator meets with any school administrator, program administrator or department head whose budgets must be changed and revise their budgets to best meet their goals and objectives.	June 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The BISD budget process is a manual, centralized process that requires duplication of effort. The Budget Department prepares a budget worksheet for each school, department and program budget manager. This worksheet is then distributed in paper copy. In 1998 school administrators and department heads were able to enter their own changes into the budget. However, the Budget administrator told the review team that there were

too many errors occurring so this practice was stopped and the process was brought back under the centralized control of the Budget Department.

Each principal and assistant principal is brought in for projections meetings in March to review all available funding sources. At the school and departmental level, the process involves the SBDMC as required by state law since 1992. The budget managers review the paper worksheet with their local decision makers and members of their SBDMC and determine how allocated funds will be spent. Budget amounts are written on the paper copy of the budget worksheet, which is then sent back to the Budget Department to be data entered into the System Design accounting system. This is the last contact that budget managers have with the proposed budget. Budget managers have no ownership in the current budget process.

Budget managers do not receive their final budget allocations until long after the budget has been adopted. When the review team was on-site during the first two weeks of September, schools and departments had only received local budgets. Often, when schools and departments do receive their entire budget for the fiscal year, it has been radically changed from the budget worksheet that was originally turned into the Budget Department. The Budget Department does not contact budget managers to inform them when their proposed budgets are changed, which makes it difficult for budget managers to plan effectively for the year.

Budget managers understand the daily needs of their program, school or department much better than central administration. They have specific expertise that can help central administration establish the limits and develop a budget that best meets the needs of the district as a whole. The concept of site-based budgeting provides for input from community members, teachers and other school staff in the resource allocation decisions that affect their respective schools. Site-based budgeting delegates more authority over financial resources to school and department decision makers. Thus, site-based budgeting is more flexible than traditional budgeting because it decentralizes budgetary decision making to those individuals who best understand the needs of individual schools. When the group is involved in the planning, the district creates group buy-in. All parties understand what the constraints are and are included in the ranking of expenditures to best meet the district's goals. It is difficult to understand why one program was cut and another one expanded unless you are present for the discussion. Although, there will never be absolute consensus, at least budget managers, with the assistance of their SBDMC, can feel that their opinions were heard. The district's Food Service Department has done an excellent job of soliciting input from all functional areas and developing a budget that best meets departmental goals.

Budget officers at Austin Community College (ACC) use the college's online budget development system to enter the information on their budgets. Once their budgets are entered into the system, they are locked out from additional input or updates, although budget officers can still monitor their input. Second-level supervisors (deans, managers, directors and coordinators) then review requests from all budget officers reporting to them and reprioritize the requests. Second-level supervisors are then locked out of the system and third-level supervisors (associate vice presidents or provost/executive deans) review and reprioritize requests from all budget units reporting to them. After third-level supervisors complete their review, by a certain date, they are locked out of the system and the budget office correlates the budget data and provides it to the executive team who reviews and reprioritizes the budget and presents the final budget to the board for review and approval. All along the input/review/reprioritize chain, locked out areas can still monitor and review their requests as they move up the budget development chain.

Recommendation 59:

Decentralize and automate the district budget process to eliminate duplication of effort and ensure all budget managers are included throughout the process.

The district can only benefit from decentralizing its budget process and delegating a portion of the decision making to those who have to live with the decisions. Budgets that have been created through cooperation provide a much better tool for financial controls than those that have been created independently without buy in from the groups they affect most.

When the district identifies the accounting system it will purchase, it should ensure that the system allows for on-line budget entry and review throughout the process much like ACC. In the meantime, the district should once more allow the budget managers to input their budgets rather than sending a handwritten copy of the budget worksheet back to the Budget Department. This will eliminate the time spent handwriting the changes and having them data-entered by the Budget Department and will also hold the budget managers accountable for any errors in their budgets. This will require budget managers to take ownership of their budgets.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Budget administrator drafts a budget calendar for the 2003-04 budget. Included in the budget calendar are assignments of responsibility for every process.	March 2003
2.	The Budget administrator develops user requirements for the	March

	new accounting system that would provide on-line access to the budget module and provides the requirements to the software committee developing the needs assessment for the system.	2003
3.	The Budget administrator sends an electronic version of the budget worksheet to budget managers.	March 2003
4.	The department heads and school administrators meet with their key staff and SBDMC to determine what their needs for the next year will be.	April - May 2003
5.	Each department and school data enter their budgetary requirements in the electronic budget worksheet and submit the worksheet back to Budget Department.	May 2003
6.	The superintendent, CFO and Budget administrator review the preliminary reviews and assess where, if any, changes should be made.	June 2003
7.	The Budget administrator meets with any school administrator or department head whose budgets must be changed and revise their budgets to best meet their goals and objectives.	June 2003
8.	The superintendent presents the recommended budget to the board. The budget is revised and prepared to go before the board for any additional changes. Should any department's budget change during this process, those schools or departments affected are notified by the Budget administrator.	July - August 2003
9.	School administrators and department heads should receive their budgets within five working days upon adoption from the Budget administrator.	August 2003 and Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 7
FINANCIAL MANAGEMENT

B. PLANNING AND BUDGETING (PART 2)

FINDING

District budget manuals and reports used to develop and adopt the annual budget do not provide district management with an adequate financial planning tool. The document includes the budget calendar, projected revenues by fund source and projected expenditures by type and by fund. Other information is provided for the operating fund, with a comparison of estimated revenues and expenditures to prior years' data. The proposed salary schedule is included without any explanation on what impact the changes will have on the budgeted amounts. Although graphs are used to present historical and projected enrollment trends, average daily attendance and taxable property values, there is no narrative included to clarify the numbers for the reader. There are a number of tables filled with numbers but again no narrative to put it all together for the reader. The only narrative is a description of the compensation plan with no attached schedules, or attachments, which provide the budget numbers to explain the narrative.

In reviewing the adopted budgets from 1997-98 through 2002-03, the board adopted deficit budgets each year from 1996-97 through 2002-03. The board adopted the 2002-03 budget under the consent agenda with a $26 million deficit. **Exhibit 7-18** presents the budgeted revenues versus expenditures from 1997-98 through the 2002-03 adopted budget. Deficit spending is a dangerous practice. Deficits must be made up by the general fund balance. The board must be certain that it understands what components make up the deficit and can be assured that the deficit is not related to recurring expenditures. If there are recurring expenditures, the same amount of expenditures will be required in subsequent years.

Exhibit 7-18
BISD Total Budgeted Revenues and Expenditures as Adopted
General Fund
1997-98 through 2002-03

	1997-98	1998-99	1999-2000	2000-01	2001-02	2002-03
Revenues	$206,839,587	$207,087,509	$227,577,056	$235,174,030	$255,517,472	$282,864,639
Expenditures	$217,251,480	$218,302,203	$238,085,528	$248,250,209	$285,983,100	$309,244,738
Surplus	($10,411,893)	($11,214,694)	($10,508,472)	($13,076,179)	($30,465,628)	($26,380,099)

(Deficit)						

Exhibit 7-19 compares the final budgeted revenues and expenditures to the actual revenues and expenditures from 1998-99 through 2000-01. In each year, the district significantly underestimated revenues and overestimated expenditures. Because the budget is so different from actual, the district cannot use the budget as a planning and financial tool because it is not an accurate reflection of the district's fiscal operations. A consistently large variance also creates the perception that the district either wants to send a negative message about its financial situation to its constituency when budgets are prepared only to be congratulated when actual expenditures and revenues are favorable or that the district does not have a true understanding of what revenues to expect and what it must actually spend to run its programs each year. Under either scenario, the budget process and the budget documents that are generated through the process have little value.

Exhibit 7-19
Comparison of Actual to Final Budgeted Revenues and Expenditures
General Fund (100-199)
1998-99 through 2000-01

1998-99			
	Budget	**Actual**	**Variance**
Local Revenues	$30,308,239	$32,339,710	$2,031,471
State Revenues	179,012,596	186,500,203	7,487,607
Federal Revenues	16,281,393	16,215,219	(66,174)
Total Revenue	**225,602,228**	**235,055,132**	**9,452,904**
Instruction	140,254,642	133,410,822	6,843,820
School Leadership	15,997,849	14,815,436	1,182,413
Support Services - Student (Pupil)	48,854,651	40,256,175	8,598,476
Administrative Support	9,035,344	8,049,549	985,795
Support Services - Non Student	28,061,950	25,698,495	2,363,455
Ancillary Services	420,765	339,035	81,730
Debt Service	170,853	58,852	112,001

Capital Outlay	8,872,787	2,099,673	6,773,114
Total Expenditures	**251,668,841**	**224,728,037**	**26,940,804**
Excess (Deficiency)	**(26,066,613)**	**10,327,095**	**36,393,708**
1999-2000			
	Budget	**Actual**	**Variance**
Local Revenues	$36,511,720	$39,685,833	$3,174,113
State Revenues	191,933,580	195,826,130	3,892,550
Federal Revenues	17,059,731	20,965,842	3,906,111
Total Revenue	**245,505,031**	**256,477,805**	**10,972,774**
Instruction	154,797,272	145,995,893	8,801,379
School Leadership	17,265,357	16,090,781	1,174,576
Support Services - Student (Pupil)	50,649,652	44,059,832	6,589,820
Administrative Support	9,242,373	7,957,055	1,285,318
Support Services - Non Student	29,516,509	28,267,229	1,249,280
Ancillary Services	440,142	373,221	66,921
Debt Service	1,515,603	3,748	1,511,855
Capital Outlay	16,613,543	5,036,970	11,576,573
Total Expenditures	**280,040,451**	**247,784,729**	**32,255,722**
Excess (Deficiency)	**(34,535,420)**	**8,693,076**	**43,228,496**
2000-01			
	Budget	**Actual**	**Variance**
Local Revenues	$42,424,838	$43,504,637	$1,079,799
State Revenues	195,113,548	195,405,102	291,554
Federal Revenues	$18,436,170	19,124,475	688,305
Total Revenue	**$255,974,556**	**$258,034,214**	**$2,059,658**
Instruction	156,456,909	146,375,310	10,081,599
School Leadership	18,520,356	18,056,683	463,673
Support Services - Student (Pupil)	51,092,169	46,635,989	4,456,180
Administrative Support	10,172,457	8,964,907	1,207,550
Support Services - Non Student	31,506,438	32,031,929	(525,491)

Ancillary Services	649,888	463,150	186,738
Debt Service	175,000	0	175,000
Capital Outlay	16,984,594	9,447,615	7,536,979
Total Expenditures	**285,557,811**	**261,975,583**	**23,582,228**
Excess (Deficiency)	**(29,583,255)**	**(3,941,369)**	**25,641,886**

Source: BISD Annual Financial Reports, 1998-99 through 2000-01.

The review team found that neither board members nor central administrators communicated an understanding of what was included in the budget. No one in district management could specify what items accounted for the deficit. Budget documents provided by the district contain no detail to explain the $26.4 million deficit. **Exhibit 7-20** is a copy of the document provided by the district to explain the $26.4 million deficit for 2002-03. It is unclear as to whether or not the district understands what it will actually spend in 2002-03. The review team requested a detailed copy of the 2002-03 budget but was told that the district had not printed a detailed copy.

Exhibit 7-20
BISD Explanation for 2002-03 Deficit

Amount	Reason
$6.426 million	Food Service
$0.600 million	State Compensatory
$0.700 million	State Career and Technology
$5.335 million	Transfer from Local Maintenance to Athletic Fund
$4.570 million	Transfer from Local Maintenance to State Special Education
$1.200 million	Purchase of buses
$6.000 million	Construction/Renovation
$0.800 million	District share of E-Rate
$0.325 million	Vehicles

Source, BISD Budget Department, October 2002.

The budget reports should contain sufficient data presented in a manner that encourage sound decision making by the board, central administrators, school administrators and department heads. **Exhibit 7-21**

outlines the criteria for a meritorious budget award program established by the Association of School Business Officials International. These criteria can be used to develop a budget packet that provides all the necessary information to all levels of district management. It assists decision makers by providing a useful operations guide, communication device, policy document and road map to lead the district toward meeting its goals and objectives.

Exhibit 7-21
Association of School Business Officials International
Meritorious Budget Awards Program Criteria

Introductory Section
• Contains an executive summary that tells the budget story in narrative, numeric and graphic form.   • Includes a listing of board members and first-level administrative personnel.

Organizational Section
• Provides detailed demographic information about the district   • Including level of education provided, geographic area served and number of schools and students.   • Includes an organization chart, mission statement and goals and objectives.   • Discusses forces that drive the budget process, such as policies and regulations.

Financial Section
• Describes the extent to which capital spending affects current and future operating budgets.   • Includes data on debt obligations and describes the relationship between debt levels and legal debt limits.

Information Section
• Explains underlying assumptions for each major revenue estimate.   • Discusses significant trends in major revenue categories.   • Presents assessed and market property values.   • Presents property tax and collection rates.   • Provides performance measures for three years.   • Presents student enrollment and personnel information.

A balanced budget is the primary goal of an effective budget process. In those instances when a deficit must be adopted to fund a one-time expenditure, such as a plan to upgrade technology infrastructure, detailed documentation provides the school board and administration the ability to track the uses of cash and ensures that recurring expenditures are not being met with monies held on reserve. Input is received from all stakeholders and each request is ranked. Once the budget requests have been ranked, the budget is then prepared. The first step identifies the district's critical needs. When the critical needs have been covered, the district runs a tabulation to ensure that operating funds are still available. With the remaining operating funds, the district then allocates budget dollars to the remaining less critical requests. However, once operating funds have been expended, no additional requests will be funded, resulting in a balanced budget.

Recommendation 60:

Revise budget documents to include more informative data and develop balanced budgets that provide realistic expectation of revenues and expenditures.

The budget represents the district's financial road map that acts as a guide to keep it operating within specific financial constraints. If it is artificially inflated, it provides little or no value. It is critical that the district develop a more accurate understanding of its revenues and expenditures. More thorough planning and discussion with the key decision makers will improve the overall process.

The budget is a public document in which financial information should be presented in a way that is easy to understand and provide relevant budget and performance data for the district's stakeholders. The budget document should present consolidated revenues by both fund and source, appropriated expenditures by both fund, function, object and summarized presentation of property tax data and enrollment projections.

The revised document should include comparative data between fiscal years for items such as:

- administrative, staff and faculty FTEs;
- summary at the object code level by school or department rather than detail transactions;
- school demographic information (ethnicity, economic status, dropout rates, etc.); and
- enrollment data.

A narrative description of the budget, the district's main goals and data for each school and unit also should be included in the public budget document. **Exhibit 7-22** is a sample presentation of selected budget data for a high school.

Exhibit 7-22
Budget Document
Jefferson High School - Fairfax County, Virginia

Position Information (FTE's)			
Position	**Fiscal 2000-2001 Budget**	**Fiscal 1999-2000 Actual**	**Increase (Decrease)**
Teachers	59.9	58.9	1.0
Counselors	3.0	3.0	-0-
Principal/Assistant Principals	4.0	4.0	-0-
Teacher Aides	6.0	6.0	-0-
Clerks	5.0	6.0	(1.0)
Food Service	7.0	6.0	1.0
Custodial/Other Staff	8.0	8.0	-0-
Total	**92.9**	**91.9**	**1.0**

Budget Data by Function					
Function	**Fiscal 1997-98 Actual**	**Fiscal 1998-99 Actual**	**Fiscal 1999-00 Estimated**	**Fiscal 2000-01 Budget**	**Percent Increase (Decrease) from 1997-98 to 2001-02**
Instruction	$500,000	$510,000	$515,000	$520,000	4.0%
Instructional Administration	120,000	118,000	125,000	130,000	8.3%
School Administration	90,000	100,000	105,000	115,000	27.8%
Etc.	1,000,000	1,100,000	1,105,000	1,120,000	12.0%
Total	**$1,710,000**	**$1,828,000**	**$1,850,000**	**$1,885,000**	**10.2%**

Student Data (1999-2000)

Total Enrollment		At-Risk	68%
Ethnicity		Bilingual	15%
Hispanic		Mobility Rate	45%
Anglo		Attendance Rate	90%
Asian Pacific		Dropout Rate (Grades 9-12)	8%
African-American		Graduation Rate	60%
Special Education		Honors Classes	12%

Source: Fairfax County, Virginia School Corporation.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The CFO directs the budget staff to look at alternative budget formats.	March 2003
2.	The superintendent establishes a committee to develop the new budget support document. The committee should be composed of an elementary school administrator, a middle school administrator, a high school administrator, all department heads, all program administrators and a curriculum representative.	April 2003
3.	The superintendent assigns each member of the committee a section of the document to prepare based on their expertise. For example, the administrator for Food Services would prepare all the data associated with the food service program. Each section should be completed by the 15th of May.	April - May 2003
4.	The Budget administrator and budget staff compile the document.	May 2003
5.	The CFO and Budget administrator present the document to the board during the first budget workshop.	June 2003
6.	In the first Budget workshop of every year, the Budget administrator reviews the past year's adopted budget with board members and compares it with actual revenue and expenditures. Any variance should be fully discussed. Included in the workshop should be a discussion of the district policy for making and approving budget amendments. The existing policy should be evaluated to ensure that adequate procedures are in place to exercise effective control over the district's budget. Each board member should be cognizant of the impact a budget amendment will have on the bottom line.	July - August 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The district does not effectively monitor the budget. The board has made financial decisions without thoroughly evaluating the impact the decisions will have on the bottom-line. For 2002-03, the board voted to approve a self-funded health insurance plan. Under a self-insured health plan, the district assumes the risk of losses from health care claims and pays all claims rather than paying premiums to an insurance company to assume the risk. The estimated "worst-case" cost of the self-funded plan was $26 million. Although the district budgeted for this amount, it did not set aside reserve funds to pay claims in excess of the $26 million. Under a self-funded plan, the district is liable for all claims up to the $250,000 per employee aggregate stop loss level. Brownsville has a high incidence of diabetes and other chronic illnesses. Chronic illnesses are usually expensive to manage and result in higher claims. It is unclear as to whether the board considered additional claims liability when making its decision to adopt a self-funded program. In making the decision, the board did not solicit input from the CFO but instead heard from staff that did not have a clear understanding of what kind of effect the self-insurance plan would have on the district's overall financial condition should claims exceed the "worst-case" scenario outlined by the insurance consultant, HCC Employee Benefits, Inc. These types of decisions, made without the input from experienced and knowledgeable staff can quickly drive the district to a financial crisis.

The district's Finance Department prepares and presents quarterly financial reports to the board. These statements provide information on the amended budget, year-to-date expenditures and budget funds remaining. The statements are presented for the general fund, special revenue funds, debt service fund, the capital projects fund and internal service funds. The financial statements also present a cash flow report for each of the funds.

The CFO does not present the board with a formal monthly report during its meetings regarding the financial activity of the district since the last board meeting, the cash position of the district or a follow-up on whether the district was within budget. It is difficult for the board to make well-founded decisions without a clear understanding of the budget, the financial statements and cash investment reports.Receiving this information once a quarter does not allow the district to make prompt adjustments when a problem has been identified.

Crystal City ISD (CCISD) encouraged stakeholder understanding and participation by preparing informative budget analyses for the board and public. The budget reports are included in the monthly board meeting packets. These reports contain summary information on all variances from the budgeted amounts. Finance Office personnel are routinely available at board meetings to answer any questions that the board, community member or parent might have regarding the information presented. The Finance Office manager downloads budget data into a spreadsheet in order to generate the reports. The district supplemented large budget variances with written or oral explanation.

Recommendation 61:

Require the chief financial officer to present budget summaries at each regular board meeting and fiscal impact statements for each agenda item.

The board should base its financial decisions on the most accurate and thorough information available. Decisions cannot be made independently without considering the global perspective. It is critical that the board understands what the impact of their decision will have on the district's financial position as a whole. The fiscal impact of each agenda item should be included in the monthly report prepared by the CFO. It is the CFO's responsibility to keep the board informed of the district's financial position. This cannot be accomplished with a quarterly report. The information provided should be easily understood by all stakeholders. If this information is not being shared and understood, it becomes difficult for the board to make sound decisions that do not place the district in a precarious financial state. **Exhibit 7-23** provides an example of the types of reports that should be included in the board packet.

Exhibit 7-23
Sample Financial Report Presentation
For the Month Ending MM-DD-YY

Report Name	Description	Report Components
Budget vs. Actual	Compares actual revenue and expenditures to budget	• Actual revenue to date • Budgeted revenue to date • Variance • Explanation/Summary
Cash Flow (General Fund)	Summarizes the district's cash position	• Beginning balance • Receipts during month • Expenditures for month • Additional

		encumbrances • Ending balance
General Fund Balance	Summarizes the district's general fund	• Beginning general fund balance • Changes during the period • Ending general fund balance • Target general fund balance
Investment Report	Summarizes the district's investments and interest earnings.	• Name of account • Beginning Balance • Interest Earned • Ending Balance
Extraordinary Items	Presents any non-budgeted items	• Description of item • Purpose of item • Function • Impact on general fund balance

Source: Gibson Consulting Group, Inc., October 2002.

Where possible, the CFO should incorporate bar charts and graphics to further simplify the reports for the board. The CFO should present a summary to the board as a monthly agenda item. This will identify problem areas immediately so that necessary action can be taken before the issue escalates.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The CFO develops financial reports using the recommended criteria and a format for fiscal impact statements for agenda items.	March 2003
2.	The CFO presents the new financial reports and format for fiscal impact statements for agenda items to the board for their review and suggestions.	April 2003
3.	The CFO begins preparing financial reports for the board and fiscal impact statements for each agenda item.	May 2003

4.	The board sets an agenda item at every meeting to hear the CFO's report.	May 2003 and Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 7
FINANCIAL MANAGEMENT

C. FUND BALANCE

Governmental funds, such as BISD's general fund, report equity as a "fund balance." A district's fund balance is a key indicator of its financial condition. The fund balance is the difference between the assets and liabilities as reflected on the balance sheet. It is the measure of the district's financial resources available for future use after payment of all obligations.

Prudent financial management requires the accumulation of a general fund balance large enough to cover any cash outflows not offset by corresponding cash inflows. TEA sets target or "optimum" fund balances for the general fund. The formula for optimum fund balances calls for the general fund balance (unencumbered and unallocated) to equal the estimated amount needed to cover cash flow deficits for the fall period of the following fiscal year plus an estimated one month average of cash disbursements from the general fund for the nine months of the following fiscal year. **Exhibit 7-24** shows the year-end optimum fund balance calculation for BISD from 1999 through 2001. Although BISD's fund balance for 1999 through 2001 exceeded TEA's recommended optimum amount, the amount decreased.

Exhibit 7-24
Optimum Fund Balance Calculations - General Fund (Fund 199 & Fund 101)
As of August 31, 1999 through 2001

Description	1999	2000	2001
Fund balance as of 8/31 (1)	**$89,447,337**	**$98,831,715**	**$96,468,075**
Total reserved fund balance (2)	46,350,055	54,477,475	58,036,759
Fall cash flow deficits (3)	-	-	-
One month's disbursements (4)	17,000,000	20,500,000	22,000,000
Optimum fund balance (5=2+3+4)	63,350,055	74,977,475	80,036,759
Excess (deficit) fund balance (Line 1-5)	**$26,097,282**	**$23,854,240**	**$16,431,316**

Source: BISD Audited Financial Statements for the years indicated.

Exhibit 7-25 illustrates the changes in fund balance as of August 31, 1998 through August 31, 2002, as well as the changes in the proportion of the remaining fund balance that has not been reserved or designated for a specific use. A reserved fund balance refers to those funds that the district has set aside for a specific purpose and dollar amount. Often included in the reserved fund balance are funds that have been statutorily restricted, such as funds received for federal programs. The district includes Food Service funds in its general fund balance, although it is separately tracked. Food Service funds are usually all restricted funds associated with the National School Lunch and School Breakfast Programs. Designated fund balances are those that are identified by the school district management to reflect tentative plans or commitments, such as for a future construction project. The unreserved, undesignated fund balance increased in 2001-02 due largely to a transfer of $15.4 million from debt service to the general fund. Had these funds not been transferred, the unreserved, undesignated portion of the remaining general fund balance would have only been 58 percent instead of 74.3 percent.

Exhibit 7-25
Fund Balance for the General Fund (Fund 199 & Fund 101)
Unreserved/Undesignated and Total Fund Balance
As of August 31, 1998 through 2002
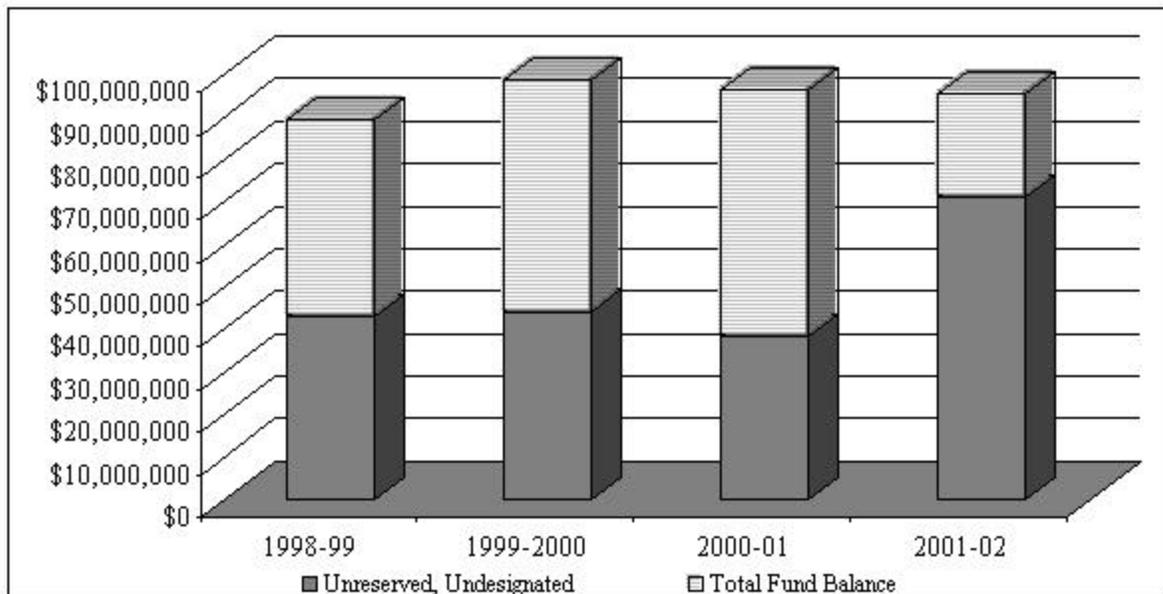
Source: BISD Audited Financial Statements, 1998-99 through 2000-01, BISD Estimated Fund Balance at August 31, 2002.

FINDING

The school board has not adopted a policy to effectively manage and maintain its general fund balance. Although the August 2002 estimated

fund balance exceeds the TEA's recommended optimum level, recent board decisions demonstrate that the fund balance is not always considered in the decision making process. When the board approved the self-funded health insurance plan, there was no mention made of establishing an adequate reserve for payment of claims. During the meeting, the board did not discuss whether this expenditure had been included in the proposed budget or what the potential impact of this decision could have on the general fund balance. District staff stated that the district has not reserved funds in the budget to cover potential liabilities arising from a self-insured plan.

Exhibit 7-26 presents the district's general fund balance from 1996-97 through 2001-02. The 2002-03 ending fund balance has been estimated by adding the projected 2002-03 revenues and subtracting the 2002-03 expenditures to the district's estimate of its ending balance as of August 31, 2002.

Exhibit 7-26
Fund Balance for the General Fund (Fund 199 & Fund 101)
As of August 31, 1996 through 2001
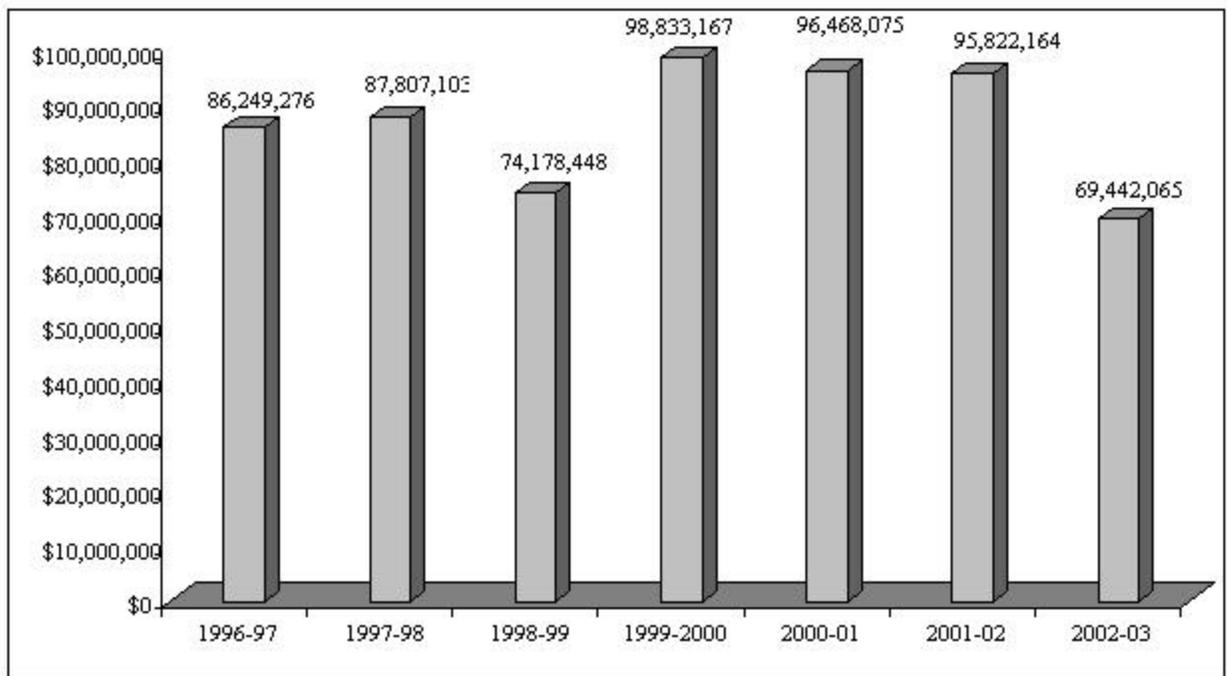
Source: TEA, PEIMS, 1996-97 through 2000-01, BISD Estimated Fund Balance at August 31, 2002.
Note: 2002-03 is based on 2002-03 budgeted revenues & expenditures.

Laredo ISD (LISD) established a general fund balance goal that exceeded the guidelines established by the TEA and is advancing toward that goal following the instructions established by the board.

LISD board policy CA (LOCAL), issued September 20, 1999, set a goal of attaining an unreserved, undesignated fund balance of at least two months' operating costs within five years. To meet that goal, the policy instructs the superintendent and business manager to implement the following steps:

- develop and submit for board approval a balanced budget with input from site-based decision making (SBDM) committees and instructional programs;
- develop staffing patterns and funding formulas based on a per pupil basis; and
- restrict any surplus funds towards unreserved, undesignated fund balance.

In the management letter for the district's 1998-99 external audit, the auditor commended LISD for adopting the policy requiring maintenance of at least two months of operating expenditures as unreserved, undesignated fund balance. The auditor further encouraged the board to support management in complying with the policy. The 2001 external audit commends the board and staff for increasing the district's unreserved, undesignated fund balance from $1.1 million in 1998 to $10.6 million in 2001.

Recommendation 62:

Establish a general fund balance policy, develop a plan to achieve and maintain a target fund balance and require reports to the board.

The board should establish a fund balance policy that contains a target general fund balance that will best meet the long-range district strategic plan. Difficult decisions must be made to prioritize the district's goals and the board should direct the superintendent to develop a three-year plan with detailed strategies to meet the fund balance target while achieving district goals. The plan should include a three-year forecast of the district's anticipated enrollment projections, revenue projections and expenditure projections. The forecast should use the 2000-01 audited financial statements as the baseline. The policy should also require that every agenda item contain a fiscal impact statement showing how the item will impact the fund balance.

Once the fund balance target has been established, the superintendent should develop procedures that help the district stay on target. These administrative procedures should present clear direction on how the target will be met and how it will be maintained. The board would then authorize the superintendent to reduce budgeted expenditures to the necessary level

and establish annual procedures to ensure that the fund balance target is maintained.

Included in the administrative procedures should be a methodology for tracking what funds have been reserved for what projects, what funds have been set aside for projects that have been identified and what funds remain. Any time designated or reserve funds become available, the CFO should prepare a memorandum stating what the change is and update the list. This list should be reviewed quarterly to ensure that it accurately presents the unreserved and undesignated reserve general fund balance.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent and CFO draft a three-year plan to maintain and manage its general fund balance in line with TEA's recommendations.	May 2003
2.	The superintendent and CFO present the three-year plan along with a proposed policy to the board.	June 2003
3.	The board reviews the plan and policy and makes any necessary modifications.	July 2003
4.	The board approves the policy setting the target fund balance and directing it to be maintained.	August 2003
5.	The CFO prepares a report for the board packet each month detailing the change in fund balance, if any, over the prior month.	September 2003
6.	The CFO reviews the components of the reserved and designated general fund balance to ensure that they are still applicable and that the district has assigned appropriate funds to meet the district's obligations under the three-year plan.	October 2003 and every month following the end of a quarter thereafter.
7.	Before each budget cycle, the board, superintendent and CFO review the target fund balance and make any required adjustments to best meet the district's needs.	January 2004 and each January thereafter

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 7
FINANCIAL MANAGEMENT

D. TAX COLLECTIONS

The assessment and collection of school district property taxes are functions involving different entities with distinct responsibilities. BISD's board sets the tax rate after the adoption of the district budget in accordance with state law. The local appraisal district is responsible for setting property values and certifying tax rolls. In May of each year, the appraisal district provides an initial revenue estimate, but certified tax rolls are not available until July. School district tax rates are applied to assessed property values, minus tax exemptions, to determine the amount of taxes to be levied. Some school districts collect their own taxes and others contract for the service with another entity. A tax attorney usually collects delinquent taxes.

BISD contracts with a tax attorney for the collection of its current and delinquent taxes. The Tax Collection Office is located in a shopping center called Paseo Plaza at 1805 E. Ruben Torres Blvd. The Tax Office is comprised of a tax assessor-collector and four permanent staff employees. The tax assessor-collector hires temporary help during the busy tax season. The Tax Collection staff is responsible for generating and mailing tax notices and collecting payments. Tax Collection staff make daily bank deposits into a district bank account.

At the August 27, 2002 board meeting, the board voted unanimously to not raise taxes and keep the tax rate per $100 valuation at $1.466, which includes a debt service tax rate of $0.038 and a maintenance tax operation rate of $1.428. **Exhibit 7-27** presents a seven-year history of BISD's adopted tax rates.

Exhibit 7-27
BISD's Historical Tax Rates Per $100 of Assessed Value
1996 through 2002

Year	Maintenance and Operations	Interest and Sinking Fund	Tax Rate	Percent Increase/(Decrease) from Prior Year
1996	$1.044	$0.291	$1.336	N/A
1997	$1.083	$0.283	$1.366	2.2%
1998	$1.103	$0.262	$1.365	0.0%

1999	$1.133	$0.283	$1.416	3.7%
2000	$1.348	$0.067	$1.415	0.0%
2001	$1.394	$0.072	$1.466	3.6%
2002	$1.428	$0.038	$1.466	0.0%

Source: TEA, AEIS, 1996-97 through 1999-2000 and BISD board minutes for 2000-01 and 2001-02.

Local school district property taxes generally include a maintenance and operations (M&O) component and an interest and sinking (I&S) component. In most school districts, the M&O component of the tax cannot exceed $1.50 per $100 of assessed property value. Voters give authorization for the I&S component of the tax to pay bonded debt when they approve a bond issue.

Exhibit 7-28 presents the amount and percentage of local taxes (including penalty and interest), other local revenue and state revenue for the general fund that BISD received for the years of 1997-98 through 2001-02. General fund tax collections have risen as a percentage of local and state revenue, from 10.1 percent in 1997-98 to 15.6 percent in 2001-02. State revenue fell from 85.4 percent of local and state general revenue in 1997-98 to 81.2 percent in 2001-02. This is a result of rising property values and tax rate in BISD.

Exhibit 7-28
**BISD Comparison of Tax Collections, Other Local Revenue
And State Revenue to Total Local and State Revenue for the General
Fund
1997-98 through 2001-02**

Description	1997-98 (Actual)	1998-99 (Actual)	1999-2000 (Actual)	2000-01 (Actual)	2001-02 (Budget)
Tax collections	$21,420,424	$24,323,925	$30,965,344	$34,732,624	$41,782,824
Percent of total local and state revenue	10.1%	11.1%	13.1%	14.5%	15.6%
Other local revenue	$9,544,932	$8,015,790	$8,720,493	$8,772,020	$8,510,559
Percent of	4.5%	3.7%	3.7%	3.7%	3.2%

total local and state revenue					
State revenue and pass-through	$180,544,460	$186,500,203	$195,826,130	$195,405,102	$217,295,710
Percent of total local and state revenue	85.4%	85.2%	83.2%	81.8%	81.2%
Total local and state revenue	**$211,509,816**	**$218,839,918**	**$235,511,967**	**$238,909,746**	**$267,589,093**

Source: BISD External Audit Reports, 1997-98 through 2001-02.

BISD's property value per student has steadily increased over the past four years. **Exhibit 7-29** displays the percentage increase between each two-year period for the last four years. The property value per student increased 34.6 percent from 1997-98 to 2001-02.

Exhibit 7-29
BISD Property Value per Pupil
1997-98 through 2001-02

1997-98	1998-99	1999-2000	2000-01	2001-02
$49,945	$54,754	$58,934	$62,610	$67,201
Percent Change 1997-98 - 1998-99		**Percent Change 1998-99 - 1999-2000**	**Percent Change 1999-2000 - 2000-01**	**Percent Change 2000-01 - 2001-02**
9.6%		7.6%	6.2%	7.3%

Source: TEA, AEIS, 1997-98 through 2001-02.

FINDING

BISD is not effectively collecting property taxes for the district. The tax attorney under contract for current and delinquent tax collection does not have any incentive to collect taxes before they become past due because the firm is paid an annual fixed fee of $144,000 for collecting current taxes and 15 percent for collecting delinquent taxes. Therefore, higher

delinquency rates mean higher fees paid to the attorney for collecting. The firm has been collecting property taxes at an average rate of 92 percent. BISD's delinquent taxes total $8.2 million as of August 31, 2001. The district's local board policy does not provide for aggressive tax collections or set any goal for tax collection rates. Board Policy CCG (Local) only states the discount rates provided to taxpayers if they pay their taxes early.

Exhibit 7-30 presents the percentage of taxes collected to the total taxes levied for the past four years. The tax collection rate for current property taxes has decreased from 92.2 in 1998-99 to 91.8 in 2001-02.

Exhibit 7-30
BISD Change in Property Value and Tax Rate;
Percentage of Current Taxes Collected to Total Levy
1998-99 through 2001-02

Description	1998-99	1999-2000	2000-01	2001-02
Assessed property value	$2,242,669,745	$2,404,812,882	$2,599,669,529	$2,893,572,675
M&O Tax Rate	$1.1328	$1.3484	$1.3938	$1.4279
I&S Tax Rate	$0.2828	$0.0672	$0.0718	$0.0377
Total tax rate per $100 value	$1.4156	$1.4156	$1.4656	$1.4656
Tax levy	$31,197,863	$33,454,823	$37,425,350	$41,279,934
Total tax collections	**$28,775,694**	**$30,783,167**	**$34,338,377**	**$37,889,504**
Percent collected to levy	**92.2%**	**92.0%**	**91.8%**	**91.8%**

Source: BISD External Audit Reports, 1998-99 through 2000-01 and BISD Tax Office, 2001-02.

BISD Finance staff told the review team that the district normally solicits request for proposals for property tax collection services for both current and delinquent taxes every three years; however, the board extended the contract with the current tax firm without going through a bid process in

April 2001. The last request for proposal was June 1998. The tax collection firm under contract has provided the district property tax assessing and collecting services for current and delinquent taxes for ten years. The district renewed both current tax collections and delinquent tax collection contracts in April 2001 for terms of three years beginning June 25, 2001 to June 24, 2004. The current tax collection contract is contingent upon the district contracting for the collection of delinquent property taxes.

In addition to paying fees, the contract requires the district to pay for the office space and utilities of the Tax Collection Office. The Tax Collection Office was previously located at the district in a portable building next to the administrative office. According to staff, the portable was dilapidated and unsafe for employees and the community. The district is now leasing office space in a shopping center and is paying $25,000 plus utilities per year.

The 1994 TSPR report recommended that the district assess the feasibility of instituting a performance-based contract and establish a "stretch" goal of 95 percent tax collection rate on current collections by the 1997-98 fiscal year. Under this type of contract, the vendor can be granted performance incentives when collections exceed 92 percent up to the 95 percent collections goal and conversely, be penalized if current collections would fall below 91 percent. The 2001-02 current tax collection rate is 91.8 and in 1994 it was 90.6 percent, which is an increase of 1.3 percent since 1994.

The contract agreement between the district and the tax collection firm does not support this recommendation. The tax collection firm does not have any incentive for collecting current taxes by the due date. In fact, the firm earns more fees by getting paid an additional 15 percent if the property taxes become delinquent and subsequently collect. The tax assessor collector stated that the penalty and interest on delinquent taxes is a cost to the taxpayer and not the district.

Exhibit 7-31 compares the district's current tax collection fees with its peers. The fees charged for BISD includes the $25,000 it pays for the office space lease. BISD pays a higher percentage for fees than its peers.

Exhibit 7-31
Percentage of Fees for Current Tax Collections for BISD and Peers
2000-01

Description	Brownsville	Corpus Christi	Laredo	North East	Plano	Ysleta

Total tax collections	**$34,338,377**	$97,421,037	$16,898,754	$235,254,510	$354,578,692	$56,421,817
Fee charged	**$169,000**	N/A**	N/A*	$178,446	$70,349	$28,200
Fee as a percent of collections	**0.49%**	**N/A****	**N/A***	**0.08%**	**0.02%**	**0.05%**

Source: BISD, LISD and YISD External Audit Reports, 2000-01 and PISD, NEISD and CCISD Comprehensive Annual Financial Report, 2000-01.
*Laredo ISD does not outsource its current tax collections.
**Corpus Christi ISD did not provide fee information.

Exhibit 7-32 compares BISD's property value, tax rate, tax levy, current tax collections and percentage of tax collections to tax levy with those of its peer districts for 2000-01. In comparing with its peers, BISD has the lowest current tax collections as a percentage of tax levy, even when compared to its border town peers, Laredo ISD and Ysleta ISD.

Exhibit 7-32
BISD vs. Peer Districts
Property Value, Tax Rate
And Percentage of Current Tax Collections to Total Levy
2000-01

Description	Brownsville	Corpus Christi	Laredo	North East	Plano	Ysleta
Assessed property value	**$2,599,669,529**	$6,294,823,406	$1,359,618,576	$12,942,099,064	$22,987,020,613	$3,750,192,620
M&O tax rate	**$1.3938**	$1.4540	$1.2829	$1.5000	$1.3858	$1.5000
I&S tax rate	**$0.0718**	$0.1160	$0.1031	$0.3000	$0.1673	$0.0496
Tax rate per $100 value	**$1.4656**	$1.5700	$1.3860	$1.8000	$1.5531	$1.5496
Tax levy	**$37,425,350**	$97,879,867	17,854,904	$238,665,098	$356,871,232	$58,112,272
Total tax collections	**$34,338,377**	$95,325,358	16,898,754	$235,254,510	$354,578,692	$56,421,817

Percent collected to levy	91.8%	97.4%*	94.6	98.6%	99.4%	97.1%

Exhibit 7-33 presents a schedule of the district's delinquent taxes receivable, exclusive of penalties and interest. According to audited financial statement, as of August 31, 2001, the district had outstanding property taxes totaling $8,235,683.

Exhibit 7-33
BISD's Schedule of Delinquent Taxes Receivable
Fiscal Year Ended August 31, 2001

Tax Year	Beginning Balance @ 9/1/00	M&O Collections	Debt Service Collections	Adjustments	Ending Balance @ 8/31/2001
1992 and prior	$759,858	$20,550	$16,955	($228)	$722,125
1993	56,476	816	5,958	1,380	51,082
1994	247,520	22,109	5,253	4,036	224,194
1995	321,678	32,947	9,879	4,405	283,257
1996	393,805	54,378	15,162	6,726	330,991
1997	597,618	119,263	31,121	7,547	454,781
1998	752,225	164,758	39,188	2,057	550,336
1999	1,354,625	315,273	78,707	7,402	968,047
2000	2,671,656	893,505	44,530	(169,724)	1,563,897
2001	37,425,350	32,413,979	1,669,769	(254,629)	3,086,973
Totals	**$44,580,811**	**$34,037,578**	**$1,916,522**	**($391,028)**	**$8,235,683**

By developing aggressive Board tax collection policies and incorporating performance-based contracts, many school districts have been able to reach higher tax collection targets. Performance-based contracts are

becoming increasingly popular for functions such as governmental revenue collections.

United ISD has increased the amount of taxes it collects by requesting that the board adopt a policy that requires the district to publish the names of anyone who owes more than $1,000 or more in accumulated taxes in the newspaper. The ad is published during the month of October each year. The list eliminates any homestead residents over 65 or any accounts that are in bankruptcy. Anyone who owes $500 or more and/or three years of delinquent taxes, whichever comes first, shall have a lawsuit filed.

Recommendation 63:

Develop a tax collection policy and prepare separate requests for proposals for current and delinquent tax collection services to eliminate conflict of interest.

The district should develop a tax collection policy that sets a target tax collection rate of 95 percent for current taxes and increases the collection of delinquent taxes by 5 percent. Current collections should be based on a fee for service basis. Including a performance or incentive based fee structure increases the possibility to collect more current property taxes by paying the tax collection agency more if they meet or exceed the targeted collection rate. The tax collection agency will be penalized if they do not meet the required tax collection rate. For example, the tax collection agency can be granted performance incentives when collections exceed 94 percent up to the 95 percent collections goal and conversely, be penalized if current collections would fall below 92 percent.

In addition, the district should increase the collection of outstanding delinquent taxes by five percent. The solution implemented by United ISD was an innovative program that should be evaluated to determine if it could succeed at BISD.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent and CFO draft a policy that sets a target tax collection rate of 95 percent for current non-delinquent taxes, increases delinquent tax collection rate by 5 percent, and pursues delinquent taxpayers.	March 2003
2.	The superintendent requests that the board adopt the proposed collection rates.	April 2003
3.	The superintendent and CFO prepare and send out a request for proposal for performance-based, non-delinquent tax collection services and a separate request for proposal for delinquent tax	March 2004

	collection services specifying in each that one entity will not be awarded both contracts.		
4.	The superintendent and CFO review proposals of all the respondents, evaluate responses and prepare recommendations to the board for approval.	May 2004	
5.	The superintendent negotiates a performance-based contract for non-delinquent tax collections and the delinquent tax collections services.	June 2004	

FISCAL IMPACT

There are two components to the fiscal impact of this recommendation: the increase in tax revenue by raising the "current tax" collection rate and the increase in tax revenue by raising the delinquent tax collection rate.

BISD's tax collection rate is 92 percent. By targeting it at 95 percent, the district would see a substantial increase in local revenues. It is anticipated that it will take three years to reach this collection rate. **Exhibit 7-34** presents the annual additional revenue associated with raising the "current" tax collection rate.

Exhibit 7-34
BISD's Projected Additional Revenue from Increase of Tax Collection Rate

Year	2001-02 Tax Levy	Proposed Tax Collection Rate	Net Increase	Less 2001-02 Amount Collected	Additional Revenues (Tax Collection Rate)
2003-04	$41,279,934	93%	$38,390,339	$37,977,539	$412,800
2004-05	$41,279,934	94%	$38,803,138	$37,977,539	$825,599
2005-06	$41,279,934	95%	$39,215,937	$37,977,539	$1,238,398
2006-07	$41,279,934	95%	$39,215,937	$37,977,539	$1,238,398
2007-08	$41,279,934	95%	$39,215,937	$37,977,539	$1,238,398

Source: Gibson Consulting Group, Inc., October 2002.

As of August 31, 2001, BISD had more than $8 million in delinquent taxes owed the district. Without increased effort to collect delinquent taxes, the amount of delinquent taxes owed would decrease as current tax collections increased. The longer the tax is delinquent, the harder it is to collect. The estimate of delinquent taxes that would be collected from an increased effort takes the age of amounts owned into account along with the increase in the collection of current taxes. **Exhibit 7-35** shows the additional revenue associated with a 5-percent increase in delinquent tax collection rates.

Exhibit 7-35
BISD's Projected Additional Revenue from 5 Percent Increase in Delinquent Tax Collections

Year	Estimated Amount Collected with Current Effort	Estimated Amount Collected with Additional Effort	Net Increase	Less Fees	Additional Revenues (5 Percent Increase)
2003-04	$3,293,929	$3,458,625	$164,696	$24,704	$139,992
2004-05	$2,985,730	$3,135,017	$149,287	$22,393	$126,894
2005-06	$2,651,918	$2,784,514	$132,596	$19,889	$112,707
2006-07	$2,437,361	$2,559,229	$121,868	$18,280	$103,588
2007-08	$2,318,479	$2,434,403	$115,924	$17,389	$98,535

Source: Gibson Consulting Group, Inc., October 2002.

Exhibit 7-36 presents the total additional revenue from increasing the "current" tax collection rate and the delinquent tax collection rate.

Exhibit 7-36
BISD's Projected Total Savings

Year	Additional Revenue (Tax Collection Rate)	Additional Revenue (5 Percent Increase)	Total Additional Revenues
2003-04	$412,800	$139,992	$552,792

2004-05	$825,599	$126,894	$952,493
2005-06	$1,238,398	$112,707	$1,351,105
2006-07	$1,238,398	$103,588	$1,341,986
2007-08	$1,238,398	$98,535	$1,336,933

Source: Gibson Consulting Group, Inc., October 2002.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Develop a tax collection policy and prepare separate requests for proposals for current and delinquent tax collection services to eliminate conflict of interest.	$552,792	$952,493	$1,351,105	$1,341,986	$1,336,933

Chapter 7
FINANCIAL MANAGEMENT

E. EXTERNAL AND INTERNAL AUDIT

TEC § 44.008 requires school districts to undergo an annual external audit performed by a certified public accountant. This financial audit is designed to assure the public that the district's financial statements accurately represent its financial condition. The external audit also reviews internal controls for material weaknesses and checks for compliance with laws, rules and regulations.

Long Chilton, LLP has performed BISD's annual financial and compliance audit for the last six years. All of the audit reports reviewed for the last three years stated that the financial statements of the district taken as a whole fairly presented the financial condition of the district and that no material weaknesses in internal controls were found by the auditors. A material weakness is a condition in which the design or operation of one or more internal control components does not reduce to a relatively low level the risk that misstatements in amounts that would be material in relation to the general purpose financial statements being audited may occur and not be detected within a timely period by employees in the normal course of performing their assigned functions.

The internal audit function also tests for compliance with laws, rules, regulations, policies and procedures; it also reviews the efficiency and effectiveness of district operations. The Internal Audit unit also conducts school audits, including audits of activity funds. Activity fund transactions are reviewed for compliance with school accounting policies and procedures. Each deviation is documented and described in a written report with recommendations to improve and correct any problems. The written report is provided to the Audit committee, Finance administrator, area superintendent, principal and to the instructional steward for the area. Written responses from the principal are required.

BISD's Internal Audit unit consists of a lead internal auditor, three internal auditors, a secretary and a clerk. The lead internal auditor position has been vacant for over one year and the clerk position has been vacant two years. The internal audit department is responsible for performing operational audits, student activity fund audits, employee time sheet reviews and special projects and investigations as directed by the superintendent.

FINDING

The district is not requesting its external auditors to provide more extensive audits that would ensure adequate financial controls are in place and financial practices are above reproach. In the past several years, various regulatory agencies have been investigating the district pertaining to bidding or lack of proper bidding practices in Purchasing, hiring practices in Human Resources, inappropriate timekeeping for hourly employees and employee and board travel expenditures. The last three external audit reports contained very few findings associated with internal control weaknesses. **Exhibit 7-37** details the findings of management letters for 1998-99 through 2000-01.

Exhibit 7-37
BISD's Audit Findings
1998-99 through 2000-01

Fiscal Year Ending 8/31/1999
• The auditors did not report any findings this fiscal year.

Fiscal Year Ending 8/31/2000
• **Budget Amendments.**The district does not have a system of internal controls to verify that budget amendments have been entered correctly into the financial system. Consequently, there were discrepancies between functions noted in the final amended budget.   • **Construction.**Required weights assigned to the bid selection criteria were not noted in the bid files verified. Evaluation of proposals for construction services requires that the district publish the criteria that will be used to evaluate the offerors and the relative weights, if known at the time of publication, given to the criteria. Weights have to be determined by the time proposals or bids are received, but they do not have to be made public. The weights shall be determined by the time the proposals are received and shall be made part of the public record.   • **Fixed Asset Donations**. District should record donated capital assets at fair market value.   • **Federal Reporting.**Supervisory review of federal reimbursements request submitted through TEA's Web site is not being performed. Currently, one accountant enters, submits and certifies that information is accurate and complete. TEA provided two levels of passwords in order to maintain the review process separate from data entry. We recommend that an appropriate level of management certify the report for final submission. The approval should be documented and maintained on file.   • **Travel Policies.**The district's administration, in conjunction with the internal auditor, has conducted a review of travel expenditures and adherence to district policy. Further review of transactions of this nature is presently in progress or planned for the near future. The problems that

have been identified may have been the result of failure to adhere to existing policy, lack of understanding of existing policy or ineffective existing policy. As this review continues, we recommend that district policies related to expense reimbursements and travel expenditures, including board related travel, be examined to determine if policy revisions or clarifications are needed to ensure that similar problems do not continue in the future.

- **GASB 34 Implementation.** The district needs to have accounting systems in place to account for general fixed assets in accordance with GASB 34 for fiscal year 2001-02. The useful life of these assets needs to be determined and a depreciation allowance will need to be recorded. The district will be required to devote much time and effort into researching information from prior years in order to complete the accrual conversion.

Fiscal Year Ending 8/31/2001

- **Personnel Files**. Two instances were found in which nepotism statements were not included in the files as required by policy. These statements should be obtained from these individuals and procedures should be reviewed to ensure that statements are completed as required.
- **Teacher Aides**. One instance was noted in which a teacher aide file did not include evidence of a high school diploma or GED as required by program guidelines. The personnel department should review these requirements with the federal programs department and coordinate their efforts to ensure the compliance is closely monitored.
- **Computer Operations**. The district presently has no written policies or procedures for daily computer room operations. Policies exist for end user security; however, no written policies exist for backing up the system, running updates, printing, report distribution, computer room security and placing service calls. We recommend that these policies be reduced to writing for use in training personnel and in the event of turnover.

Source: Long Chilton, LLP Certified Public Accountants, Management Letters for the years indicated.

An auditor's primary objective is to form an opinion and issue an opinion letter of the district's financial statements. Additionally, the auditor issues a management letter that informs the board of any reportable conditions or findings. According to the American Institute of Certified Public Accountants Auditing Standards, reportable conditions or findings are matters that represent significant deficiencies in the design or operation of the internal control structure, which could adversely affect the organization's ability to record, process, summarize and report financial data consistent with the assertions of management in the financial

statements. Such deficiencies may involve aspects of the internal control structure elements of the control environment, the accounting system or the control procedures.

In instances where there is doubt about the financial practices by both district staff and the community, many organizations require their external auditors to perform a more extensive review than what is normally performed in an external audit. This helps with public concerns about an entity's financial practices.

Recommendation 64:

Contract with external auditor to perform a more extensive review of the district's internal controls and financial practices.

BISD should negotiate with its external auditor to increase audit coverage associated with internal controls and financial practices. The district should request the auditor to be alert to the matters regarding bidding practices, hiring practices, employee and board travel expenses or any other questionable circumstances and report conditions that have problems. Under this arrangement, the district may request that the auditor visit specific locations, review specific control procedures or undertake specific procedures not otherwise planned for a regular audit. For example, the district should consider requesting the external auditor to analyze:

- a larger sample of bids;
- a larger sample of requisitions, purchase orders and checks;
- a larger sample of board and employee expenses;
- a larger sample of personnel files; and
- time sheets for hourly employees.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent, CFO and lead internal auditor meet with the external auditors to request that the audit engagement include specific criteria relating to concerns the district and community has regarding financial matters.	June 2003
2.	The CFO prepares an addendum to the audit contract for additional services to be approved by the superintendent.	July 2003
3.	The external auditors incorporate the revisions into the audit plan.	August 2003
4.	The external auditors perform the audit plan.	August 2003 through

		December 2003
5.	The external auditors report findings in the management letter.	December 2003

FISCAL IMPACT

The fiscal impact of this recommendation is based on an additional 80 hours of work at $100 per hour for a total of $8,000 per year.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Contract with external auditor to perform a more extensive review of the district's internal controls and financial practices.	($8,000)	($8,000)	($8,000)	($8,000)	($8,000)

FINDING

The Internal Audit Department's reporting relationships are not properly aligned. According to the district's Internal Audit Charter, the Internal Audit Department is governed under the direction of the superintendent and the Audit committee. However, Internal Audit staff stated that they do not have any line of communication with the Audit committee or the board. They are not invited to attend Audit committee meetings or make presentations to the board. All of their interactions are with the superintendent. By reporting to the superintendent, the Internal Audit Department is not complying with the independence standard of the General Standards for the Professional Practice of Internal Auditing. Since the review team's site visit, one of the internal auditors was requested to make a presentation to the board on findings identified during a review of the hiring practices of the district.

The 1994 TSPR review recommended that the Internal Audit Department report to the Audit Committee of the board to enhance the effectiveness and authority of this oversight function. **Exhibit 7-38** presents the organizational chart for the Internal Audit Department.

Exhibit 7-38
BISD's Internal Audit Department
Organizational Chart

2002

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                    ┌─────────────────────┐
                    │  Board of Directors │
                    └──────────┬──────────┘
                               │
                    ┌──────────┴──────────┐
                    │      Interim        │
                    │   Superintendent    │
                    └──────────┬──────────┘
                               │
                    ┌──────────┴──────────┐
                    │ Lead Internal Auditor│
                    │      (Vacant)        │
                    └──────────┬──────────┘
              ┌────────────────┴────────────────┐
        ┌──────────┐                       ┌──────────┐
        │ Secretary│                       │ Clerk II │
        └──────────┘                       └──────────┘
      ┌────────────┬──────────────────┬──────────────┐
┌──────────────┐ ┌──────────────┐ ┌──────────────┐
│Internal Auditor│ │Internal Auditor│ │Internal Auditor│
└──────────────┘ └──────────────┘ └──────────────┘
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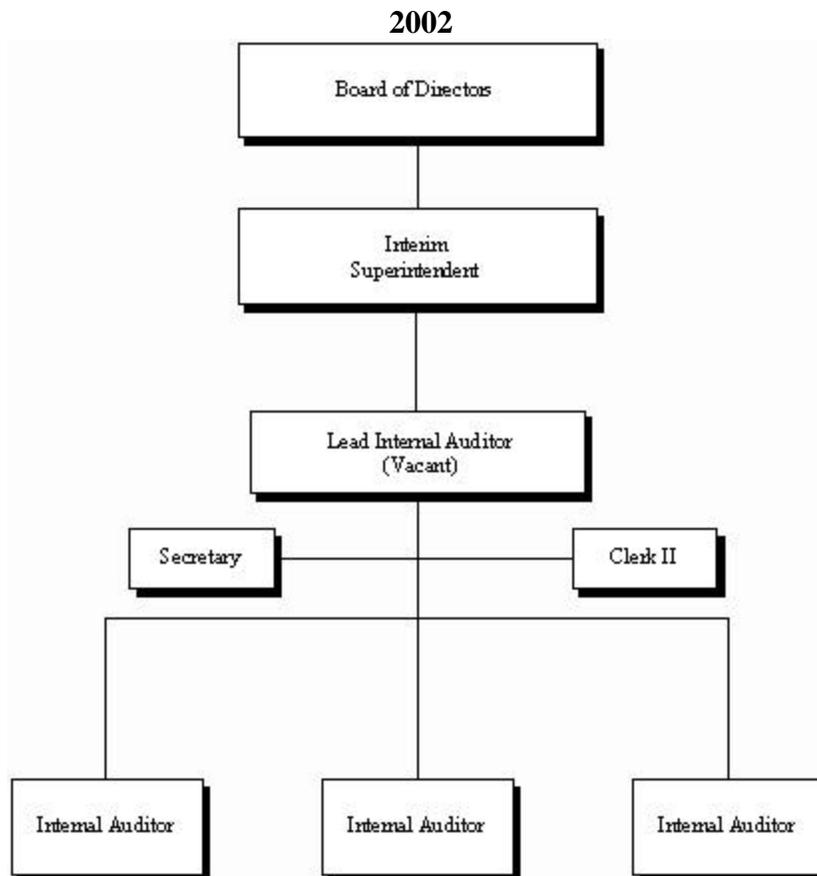
Source: BISD Internal Audit Department, September 2002.

The BISD Internal Audit unit reports directly to the superintendent. One of the most important standards for internal auditors is independence. Independence is the ability of an auditor to remain impartial and free of influences that might impair professional judgment. If an auditor's independence is damaged, audit quality will suffer and the purposes of the audit function will not be achieved.

The Internal Auditing Department could be called upon to perform an audit directly related to the superintendent and might feel pressured, with or without cause. At the very least, the internal auditor's reporting responsibilities to the superintendent could suggest a lack of independence to community members; district staff both outside and within the division; or the news media. The IIA's Professional Practice of Internal Auditing standard 1110 Organizational Independence states "*the lead auditor should report to a level within the organization that allows the internal audit activity to fulfill its responsibilities.*" Subsection 1110.A1 states that "*the internal audit activity should be free from interference in determining the scope of internal auditing, performing work and communicating results.*"

Internal audit reports are sent to the superintendent and are referred to the board at the superintendent's discretion. The 2002-03 audit plan that was submitted to the board in May 2002 has not been approved. The Internal Audit staff is also not aware whether the board receives the reports or discusses audit findings.

In many large school districts, the board of trustees receives both internal and external reports directly from the auditors and address all audit issues. During the 1980s, the Treadway Commission was established to study issues concerning fraudulent financial reporting and to determine the best way to make managers and board members more responsible for internal control and financial management control. The Treadway Commission recommended that the board be, "*Informed, vigilant, and effective overseers of the financial reporting process and the entity's internal controls.*"

The board of a school district is the appropriate body for an internal auditor to functionally report to in order to comply with the professional internal audit standard dealing with independence. Typically, a board would be responsible for the following items:

- develop a formal internal audit charter of authority, duties, and responsibilities;
- recommend the appointment or removal of the director of internal auditing;
- review audit plans and audit budgets;
- review audit results and management's responses to audit findings and recommendations; and
- follow-up on unresolved audit findings and recommendations.

Recommendation 65:

Develop a board policy to require the internal auditor to report functionally to the Board of Trustees and administratively to the superintendent.

The BISD should modify the internal auditor's reporting relationship to strengthen the auditor's independence. Board of Trustees should serve as an oversight body for the internal auditing function and require that the Internal Audit staff provide them and the superintendent with written audit reports. The board should develop written policies to provide authority to the internal auditor and to provide open communications.

IMPLEMENTATION STRATEGIES AND TIMELINE

| 1. | The superintendent recommends to the board that the internal auditor | March |

	report to the board functionally and to the superintendent administratively.	2003
2.	The board establishes written policies delineating the authority of the internal auditor, requiring audit reports to be given to the board and requiring regular formal presentations to the board.	April 2003
3.	The internal auditor begins to report functionally to the board and administratively to the superintendent.	April 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The district's Internal Audit department is lacking leadership due to the vacancy of the lead internal auditor position and job descriptions for Internal Audit staff do not require sufficient technical proficiency and educational background requirements. The lack in leadership and insufficient technical proficiency has resulted in less-than-adequate results from the internal audit function, such as not consistently preparing effective annual audit plans and not completing annual plans due to inability to prioritize special projects and investigations not included in the initial plan.

The district is not in compliance with the Institute of Internal Auditors' (IIA) Professional Practice of Internal Auditing standards professional proficiency and management of the internal audit unit because of its inadequacies in management and technical proficiencies. The IIA is the primary national professional organization for internal auditors. The IIA establishes standards, issues pronouncements and provides resources, support and training for the internal auditing profession. The IIA-established standards for the professional practice of internal auditing serve as the criteria by which the operations of an internal auditing department can be evaluated. **Exhibit 7-39** presents the IIA standards for professional proficiency and management of the internal audit unit.

Exhibit 7-39
Standards for the Professional Practice of Internal Auditing

Standard	Description
Professional Proficiency	Internal auditors should possess the knowledge, skills and other competencies needed to perform individual perform their individual responsibilities. The internal audit activity

	collectively should possess or obtain the knowledge, skills and other competencies needed to perform its responsibilities.
Managing the Internal Audit Activity	The lead internal auditor should: • Effectively manage the internal audit activity to ensure it adds value to the organization. • Establish risk-based pans to determine the priorities of the internal audit activity, consistent with the organization's goals. • Establish policies and procedures to guide the internal audit activity. • Communicate the internal audit activity's plan and resource requirements to senior administration and the board for review and approval. • Ensure that internal audit resources are appropriate and sufficient and effectively deployed.

Source: Institute of Internal Auditors, Standards for the Professional Practice of Internal Auditing.

The current job description for the lead internal auditor requires only three years of auditing experience, and none of the positions are required to have an accounting degree, it is only preferred. **Exhibit 7-40** presents the qualification requirements for the lead internal auditor and other internal auditor positions.

Exhibit 7-40
Internal Audit Department Job Descriptions

Position Title	Prerequisite	Preferred
Lead Internal Auditor	• Bachelor' Degree • Minimum of three years experience in internal or external auditing • Some formal training in public school accounting and business office procedures and related areas • Ability to provide technical assistance to the	• Degree in Business Administration with major in Accounting • Certified Public Accountant

	Accounting Department staff	
Internal Auditor	• Bachelor' Degree • Ability to provide technical assistance to the accounting department staff • Minimum of one year experience in internal or external auditing	• Degree in Business Administration with major in accounting • Specific formal training in public school accounting and business office procedures and related areas

Source: BISD Internal Audit Department, 12/02/99.

None of the internal auditors are certified public accountants (CPAs) or certified internal auditors (CIAs). All three auditors have college degrees in accounting, and one is a candidate for the certified fraud examiner. One auditor has worked in the Internal Audit Department for ten years, while the other two auditors have been in the department approximately three years. The internal auditors obtain over 30 hours of continuing education training each year, primarily in courses pertaining to internal audit, fraud and accounting.

The lead auditor position has been vacant since May 2001. District staff interviewed stated that the pay offered for the position has not attracted applicants. The position is a pay grade four with a pay range of $54,000 to $68,000. This pay range is comparable to the City of Brownsville and Cameron County internal auditor positions. The qualification requirements in the job description do not require the lead auditor to be either a CPA or a CIA. Moreover, the qualifications for this position require an individual to have only a minimum of three years in internal or external auditing.

Although significant institutional knowledge resides with the existing staff because of their years of service with the district, adequate planning and managing the department's annual audit activities has been lacking. Audit staff members also said that special projects assigned by the superintendent and the timekeeping reviews do not allow them to perform the scheduled district operations audits. At the time of the TSPR site visit, the Audit staff members were reviewing the district's hiring practices and bidding practices.

Recommendation 66:

Revise job descriptions for the internal audit staff to require additional technical proficiency, experience and certifications and fill the Lead Internal Auditor position.

The area superintendent of Human Resources, with assistance from the CFO, should revise the job description for the lead internal auditor position. The lead internal auditor should be a certified public accountant or certified internal auditor with at least six years of internal audit management experience, preferably in a school district or similar entity. The district should then advertise for applicants and fill the lead auditor position with a qualified applicant. Once the lead internal auditor position if filled, staff auditor job descriptions should be revised to include requirements for a college degree in accounting and a minimum of three to five years of audit experience. BISD should continue to provide opportunities for the current staff to obtain the training that will enable them to increase their expertise and become certified as internal auditors.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The area superintendent of Human Resources revises the job description for the lead internal auditor.	March 2003
2.	The area superintendent of Human Resources obtains superintendent and board approval for the revised job description.	April 2003
3.	The area superintendent of Human Resources aggressively solicits candidates for the lead internal auditor position.	May 2003
4.	The area superintendent of Human Resources and the superintendent interview qualified candidates and recommends the most qualified to the board for approval.	June 2003
5.	The lead internal auditor begins work.	July 2003
6.	The lead internal auditor reviews and revises the job descriptions for staff auditor positions.	August 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The Internal Audit Department's audit plan does not contain the essential elements of a well-designed audit plan and is not based on a comprehensive risk assessment. An audit plan is the internal auditor's road map. It points to where the auditor plans to expend effort during the audit

cycle. A poorly constructed plan may lead to confusion and unfulfilled expectations. If the plan is unclear and poorly designed, the auditor may not reach the intended goal or destination.

The District's Internal Audit Department does develop an audit plan for each fiscal year; however, they have not able to complete the audits in the original plan due to special projects and changes in plans at the direction of the superintendent.

BISD's fiscal 2002 audit plan is simply a chart that shows the department to be audited. The review team was not provided with documentation entailing how the audit plan was developed. **Exhibit 7-41** presents the 2002-03 audit plan:

Exhibit 7-41
BISD's Fiscal 2002-03 Audit Plan

Audit Type	Departments /Activity
Scheduled Audits	• Admissions & Attendance • Finance • Fixed Assets • Health Services • Insurance & Safety • Instructional Technology • Library Services • Public Information • Student Accounting
Special Audits/Projects	• Timesheets review
End of Year Audits	• Agency Funds • Change of Administrator

Source: BISD Internal Audit Plan, 2002-03.

One of the most important elements in an audit plan is the risk assessment. If an audit plan is not based on a comprehensive risk assessment, the auditor may waste effort auditing the wrong areas. Auditors do not have unlimited resources. Therefore, a risk assessment allows them to place more audit effort on areas with greater risk. The best audit plans are linked to a risk assessment. The IIA Standards 2010 and 2010.A1 state, '*The chief audit executive should establish risk-based plans to determine the priorities of the internal audit activity, consistent with the organization's*

goals.... The internal audit activity's plan of engagements should be based on a risk assessment, undertaken at least annually. The input of senior management and the board should be considered in this process."

In addition, the alignment of the internal audit department's audit plan to the district's strategic plan provides management with valuable information about the effectiveness of the organization's controls and processes. Such information is useful for decision-making. The best value for an organization is attained when it links risk assessments to the audit plan and then links the audit plan to the organization's strategic plan. This process focuses audit effort on the most important areas and aligns the internal audit department's goals with those of the organization. The outcome is a more effective auditing function. **Exhibit 7-42** presents the characteristics of a best practice audit plan.

Exhibit 7-42
Characteristics of a Best Practice Audit Plan

Characteristic	Description
The plan's projects are selected based on risk assessment and include a discussion of overall audit objectives	More resources are allocated to areas of higher risk. The audit plan includes The risk assessment and audit objectives for each project are included in the audit plan. Audit objectives provide an explanation of how their accomplishment will benefit the organization.
The plan is subject to modification to meet the needs of the organization.	Changes should not be made at the request of auditees who simply want audits postponed for their convenience; however, flexibility should be built into the plan to accommodate the needs of the organization.
The plan allows for input from senior management regarding their assessment of risk and exposure before the plan is finalized.	When management has had input into the audit plan, there is more likely to be cooperation from auditees and a shared sense of ownership of the final product.
The plan shows how staff resources will be allocated to audit projects.	An important standard of audit fieldwork is that staff be assigned to projects that match their skill and experience level. Allocation of staff resources in the plan also provides assurance that audits will be properly staffed and supervised.
The audit plan is linked to the organization's strategic plan.	The alignment of the audit plan to the agency strategic plan provides management with pertinent information that can be used in decision-making.

	When the strategic plan is also linked to the budget, it becomes more likely that the internal audit department's initiatives will receive the necessary funding.
The plan has estimated start and completion dates.	Estimated timelines are necessary to prevent projects from being delayed unnecessarily and to keep projects that have started on track.

Source: Compiled by review team from several audit plans containing various elements of a well-defined plan.

Several organizations have incorporated various elements of a well-constructed audit plan into their documents. For example, the Florida Department of Juvenile Justice has a plan that is risk-based driven and incorporates most of the other elements of a well-defined plan such as explanations of audit objectives and timelines. The Georgia Institute of Technology's audit plan contains predetermined risk factor values that are assigned based upon the type of audit planned. Corpus Christi Independent School District's audit plan shows the allocation of staff hours by project. Finally, Dallas Independent School District's audit plan lists anticipated benefits of accomplishing the audit objectives.

Recommendation 67:

Improve the internal audit plan by incorporating risk assessments and a discussion of overall audit objectives.

The Internal Audit department should perform a comprehensive risk assessment each year as a bases for its audit plan. The risk assessment process should include an assessment of relevant risks and their significance; consideration of senior management's, the board's and the lead auditor's professional judgment; and the identification of activities to be audited. In order to assess the levels of risk to the district, the risk assessment should evaluate the following:

- Information systems environment;
- Reliability and integrity of financial and operational information;
- Effectiveness and efficiency of operations;
- Safeguarding of assets; and
- Compliance with laws, regulations and contracts.

IMPLEMENTATION STRATEGIES AND TIMELINE

| 1. | The superintendent directs the lead internal auditor to perform a | March |

Chapter 7
FINANCIAL MANAGEMENT

F. ACCOUNTING, INTERNAL CONTROL AND PAYROLL

A district's accounting and payroll functions are critical for the maintenance of a solid financial foundation. Accurate and timely financial reports are crucial to administration and board decision-making. Payroll must be accurate, as it represents the district's largest budgeted expenditure. Internal controls must safeguard the district's assets from misappropriation.

BISD uses System Design software to maintain its financial records. Although this software provides the basic information needed to manage the district's finances, it does not meet BISD's total needs, and the district plans to replace it. Many of BISD's processes are manual in various departments including Accounting, Purchasing, Human Resources and Budgeting. The planned acquisition of new software is discussed in the Computers and Technology chapter of this report.

The current software provides the general ledger, subsidiary ledgers, and comparative financial reports for both the current period and year-to-date. The financial software includes an encumbrance module the district uses to ensure that its expenditures do not exceed the budget. This module places a hold on budgeted funds as soon as a purchase order is entered and will not accept the purchase order if sufficient funds are not available. The software produces the information needed to fulfill TEA's financial reporting requirements, including the reporting of financial information for PEIMS as required by TEC §42.006. The system also accounts for revenues and expenditures based on the fund, function, object, cost center and program intent codes described in the FASRG.

BISD's accounting functions are segregated so that no one person has control over an entire function. This segregation of duties is an effective internal control. For example, Purchasing issues purchase orders, Accounts Payable processes invoices for payment, and Accounting affixes the appropriate signatures to the checks using signature plates. The bank reconciliation clerk reconciles the bank accounts and is not involved in processing or approving items for payment.

A Payroll administrator, supervisor, specialist and six clerks perform the payroll function. The Human Resources Department enters employee data into a database shared by Personnel and Payroll and sets the rate of pay. The software system controls the ability of individuals to change

information based on their access to the system. This prevents unauthorized individuals from changing this information. Payroll:

- reviews the pay calculations made by Human Resources based on the number of days the individual will work;
- receives the deduction information for benefits and enters the deductions in the payroll system;
- maintains leave balances for classified employees.

The Payroll Office processes 26 biweekly payrolls for bus drivers, food services and maintenance staff, 12 monthly payrolls for clerical staff and 12 monthly payrolls for professional staff during the course of each year. As of August 2002, 73 percent of BISD's employees participate in the direct deposit program.

FINDING

BISD does not have a districtwide automated timekeeping system to accurately process payroll. Hourly employees in the district, such as custodians and food service workers, complete manual timesheets or punch manual time clocks. These timesheets are manually calculated by a clerk in the school or department where the employee works and are submitted to the Payroll Department. Payroll Department staff must then enter all hours worked for the hourly employees and verify that gross pay was calculated accurately. Manual processes increase the potential for errors and require more labor hours to reconcile reports to the data when entered manually.

Although the Transportation Department uses a timekeeping system, called Kronos, that allows employees to "scan" an identification badge in a timekeeping device, the information cannot be uploaded to the payroll system. Two Transportation Department clerks run a report from Kronos and manually write the information from the system to a payroll form. The payroll form is submitted to the Payroll Department where a Payroll clerk data enters the information to the payroll system.

Due to inaccuracies of timesheets, the district underwent an investigation in 1999 by the U.S. Department of Labor's Wage and Hour Division regarding the district's process for the handling of overtime paid to employees. The district paid approximately $500,000 in restitution to employees for overtime wages; however, the Wage and Hour Division waived any fines due from the district. According to BISD staff, the district would have paid over $1 million in penalties or $1,000 per infraction. The Wage and Hour Division continues to work closely with the district to ensure that it is reporting employees' hours accurately, but

has warned BISD that it would not waive any penalties if any problems occurred in the future.

The district continues to experience problems with employees not completing timesheets accurately. To ensure that the district is not violating the Department of Labor's Federal Labor Standards Act regulations, the Internal Audit staff allocates time to perform unannounced audits of time sheets to schools and departments to ensure compliances with the wage and hour procedures. These audits take time away from needed audits of departments and schools. **Exhibit 7-43** illustrates the number of timesheet discrepancies found by the Internal Audit staff for schools and departments.

Exhibit 7-43
BISD Timesheet Audit Results
2002

Dates of Audits	March 8, 2002		May 14, 2002		August 16, 2002	
	Number Audited	**Number of Discrepancies**	**Number Audited**	**Number of Discrepancies**	**Number Audited**	**Number of Discrepancies**
Departments	25	33	29	29	55	33
Schools	28	174	30	172	30	172

Source: BISD Internal Audit Department Memorandums to Superintendent.

Most discrepancies identified by Internal Audit Staff are due to employees not signing in and out during the lunch hour; however, other incidents found but to a lesser degree are not signing in for the day, pre signing out for the day, employees falsifying timesheets, lost timesheets and inaccurate timesheets.

Documentation provided to the review team indicates that the district has annually researched automated time-keeping systems since 1998. During the 2001-02 fiscal year, the district staff selected a timekeeping system and was preparing a request for proposal when it was postponed due to budget constraints. The Payroll administrator informed the review team that the timekeeping system that they selected has the capability to interface with the financial system the district is reviewing to replace its current accounting system.

Most large school districts use an automated timekeeping system to facilitate payroll processing. School districts in Texas that have successfully installed timekeeping systems include Richardson ISD and Irving ISD.

Streamlining payroll processing was a top priority for the Richardson Independent School District. They needed a system that could provide a variety of data input options in order to serve the needs of their diverse employee groups. With the automated system, all their pay policies and leave policies are applied accurately and impartially. The system's automatic interface transfers employee information to other vital applications, including their payroll and personnel systems. This means that supervisors now have the tools to retrieve a history of attendance, hours worked, and accrued leave at their desktops. On the district level, the elimination of paperwork and timely, accurate, information-on-demand ensures more effective management of their labor throughout the school system.

Faced with a growing number of students and employees, Irving ISD needed to upgrade its time and attendance system. Irving ISD used to rely on a paper-based system to track and pay its 600 hourly employees within its food services, custodial, and maintenance departments and found that the system was inefficient and not at all cost-effective. In addition to the inefficiencies, Irving ISD suspected that its system might be wasteful and that there was evidence that they might have been overpaying some employees as a result of not being able to track their hours accurately. This led them to believe that an automated time and attendance system would eliminate these inefficiencies and allow them to save money along the way.

Automated systems are capable of tracking employee attendance through magnetically encoded identification badges that are "scanned" into time keeping machines. Systems calculate the number of hours worked each day by hourly employees and can interface with the payroll modules, thereby reducing the number of hours Payroll staff spends to process payroll. Other benefits of the timekeeping system include:

- recording time and attendance immediately and accurately;
- allowing staff real-time access to leave balances;
- reducing the amount of paper processed;
- reducing the errors of recording and calculating employee time and leave;
- applying pay rules and policies consistently to all employees; and
- providing audit trails for any adjustments or changes made to employee records.
- providing management reports.

In addition to timekeeping, some software can be used as a smartcard or key card to allow access to buildings, rooms within buildings and to charge items at approved vendors.

Recommendation 68:

Purchase and require all hourly staff to use a districtwide automated timekeeping system.

The district should proceed with the preparation of the request for proposal and implement the selected timekeeping system. A timekeeping system will allow the district to issue employees magnetically encoded identification cards that can be used to "swipe" a time clock located at schools and district offices. The district may want to consider selecting a timekeeping system that allows employees to "clock in" by logging into the timekeeping system through their personal computers. Magnetically encoded identification cards also can be used as building keys. The timekeeping system should have the capability to interface with the new finance and accounting system the district is planning to acquire so that time data can be uploaded from the timekeeping system to the accounting system. The district should review staffing levels once the timekeeping and financial accounting systems have been implemented to determine if efficiencies have been realized to the extent that unnecessary positions can be eliminated.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent requests board approval to proceed with a request for proposals for a districtwide automated timekeeping system.	March 2003
2.	The CFO, Payroll administrator and Information Technology staff prepare a request for proposals and submit to the Purchasing administrator.	March 2003
3.	The Purchasing administrator posts the request for proposal.	April 2003
4.	The CFO, Payroll administrator, Information Technology and Purchasing staff reviews proposals received and prepare a recommendation to be presented to the board for approval.	June 2003
5.	The superintendent presents staff's recommendation to the board and requests a budget amendment for the purchase of the timekeeping system.	July 2003
6.	The board approves the purchase and budget amendment.	August 2003
7.	The Information Technology and awarded vendor commence installation of automated timekeeping system.	September 2003

FISCAL IMPACT

Based on 54 collection devices, the one-time cost of an automated timekeeping system is $375,000. One device would be installed in each of the 48 schools and the remaining six in the administration building, transportation, food services and the warehouses. Depending on the results of the staffing review performed by the district after the implementation of the timekeeping and financial systems, there could be a staff reduction savings.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Purchase and require all hourly staff to use a districtwide automated timekeeping system.	($375,000)	$0	$0	$0	$0

FINDING

Although individual finance-related areas such as payroll, accounts payable and accounting have their own procedures manuals, BISD does not have a comprehensive procedures manual for its business and financial processes. The Budget Department does not have any written procedures. Procedures provided to the review team by the various areas were dated and some were not complete or comprehensive and systematic.

Written procedures serve various functions. They provide written notice to all employees of an organization's expectations and practices; provide direction in the correct way of processing transactions; serve as reference material; and provide a training tool for new employees. Written procedures also provide a source of continuity and a basis for uniformity. Without clear, written and current procedures, BISD's internal control structure is weaker because practices, controls, guidelines and processes may not be applied consistently, correctly and uniformly throughout the district.

In the January 22, 2001 Finance Department Internal Audit Report, the lead internal auditor recommended that the department develop detailed written procedures. He states in the report that "The Finance Department's internal control structure governing the department's operating cycle is unsatisfactory. Although the control environment is suitable for effective internal controls, audit tests identified critical weaknesses in the areas of risk assessment and control activities. It appears that lack of written procedures is directly affecting management's ability to implement effective control activities. Verbal directives are effective as short-term procedural solutions but become less reliable over time." Examples of occurrences listed in the report are:

- Board members submitted travel reimbursement forms without the proper documentation to support the expenditures and the district paid the requests. This is a violation of policy BBG (Local).
- Travel advances paid to Board members were not adequately documented and reconciled in a timely manner. Audit tests indicate that the time Board members took to return unexpended funds ranged from three months to one year or failed to return the money.
- The criteria used by the Accounts Payable Department for verifying the legitimacy of vendor charges are inconsistent. Audit tests identified payments to the Media Service totaling approximately $42,314 that did not adequately support the expenses.
- Construction expenses are not routed through the Accounts Payable Department. Administration has opted to directly request checks from the Finance Department bypassing key separation of duties controls. This practice weakens the department's internal controls and increases the risk of misappropriations."

The Houston Independent School District codified its finance-related activities in a two-volume procedures manual published in 1995. The manual was to be updated and become available on the district's Web site sometime during 2001. The manual includes organization charts of financial areas, a finance office telephone directory and a summary of who handles what. In 16 sections it covers, among other areas, accounts payable, activity funds, budgeting and planning, financial reporting, purchasing, payroll, benefits and risk management.

Recommendation 69:

Develop a comprehensive districtwide financial management procedures manual.

A comprehensive districtwide financial management procedures manual should help the district eliminate non-compliance issues that have been pointed out in internal audit reports. When staff perform their duties without the benefit of up-to-date written procedures they many times fail to perform those functions in a manner that comply with district policies due to being uninformed or misinformed.

All financial related department administrators should develop detailed written procedures for their areas and combine to create a districtwide procedures manual. The procedures manual should be updated regularly to ensure that staff have accurate information. This tool should provide staff members with detailed procedures for performing critical accounting and reporting functions. Moreover, it should institutionalize the district's

vision, philosophy, operating procedures and general practices. It should clearly communicate acceptable and unacceptable practices as well as the consequences of violating its provisions.

The manual should be detailed enough to be useful in daily operations, yet flexible enough to be used by current as well as future employees. At minimum, the manual should include:

- Budget policies and procedures
- Payroll policies and procedures
- Accounts payable policies and procedures
- Activity fund policies and procedures
- Treasury policies and procedures
- Accounting policies and procedures
- District procedures governing approvals for checks and journal vouchers
- Procedures for cash receipts and travel reimbursements
- Procedures and controls for safeguarding district fixed assets
- Descriptions of each process performed in all the financial-related departments
- Detailed desk level instructions for the most critical processes
- District procedures governing distribution of financial reports

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent instructs the CFO to develop comprehensive financial management procedures for all financial processes.	March 2003
2.	The CFO organizes a procedures task force consisting of representatives from Accounting, Payroll, Budget, Accounts Payable, Investments and other financial departments in the district.	March 2003
3.	The CFO directs the task force in conducting a search for best practices and to identify the best model for the district.	March - April 2003
4.	The CFO and task force review existing procedures and develop a comprehensive financial management procedures manual for the district.	May - October 2003
5.	The CFO presents a draft copy of the procedures manual to the lead internal auditor for review and comment.	November - December 2003
6.	The CFO present the procedures manual to superintendent for review and approval.	January 2004

7.	The superintendent instructs the CFO to publish the manual and distribute it throughout the district.	February 2004

FISCAL IMPACT

This recommendation can be implemented with existing resources.

	comprehensive risk analysis and to incorporate elements of a well-constructed audit plan into the departments' annual audit plan.	2003
2.	The lead internal auditor obtains examples of audit plans of other school districts and other organizations to use as a model and develops plans to perform a comprehensive risk analysis.	April - May 2003
3.	The lead internal auditor prepares a comprehensive risk analysis and develops the annual audit plan based on the results on the analysis.	June-July 2003
4.	The lead internal auditor presents the audit plan to the superintendent for review and to the board for approval.	August 2003
5.	The lead internal auditor prepares audit plans based on comprehensive risk analysis.	Annually

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 8
PURCHASING AND WAREHOUSING

This chapter reviews the Brownsville Independent School District's (BISD's) purchasing and warehousing in the following sections:

A. Purchasing
B. Warehouse Services
C. Textbooks

Efficient purchasing and warehousing require management processes that ensure the district purchases supplies, equipment and services vital to the school's mission from a competitive source, in the right quantity, delivers them to the correct location in a timely manner, and stores them in a secure location. The district should meet these criteria for each purchase without sacrificing quality.

Chapter 8
PURCHASING AND WAREHOUSING

A. PURCHASING (PART 1)

In 1995, the Texas Education Code (TEC) changed to expand school district purchasing options by adding three new methods of competitive procurement: design-build contracts, competitive sealed proposals and request for proposals for personal property and construction contracts. In 1997, the Texas Legislature included two additional methods: job order contracts and contracts using construction managers. In 2001, the Legislature added yet another method of competitive procurement, the reverse auction procedure. With these additions, school districts can select among nine methods to satisfy competitive purchasing requirements for goods valued at $25,000 or more, or multiple like items with a cumulative value of more than $25,000 in a 12-month period **(Exhibit 8-1)**.

For purchases valued between $5,000 and $25,000, school districts must obtain quotations from at least three suppliers, including a formal written and sealed bid if the purchase is between $10,000 and $24,999. Districts can make purchases of less than $5,000 if they acquire quotations from one to three vendors.

Exhibit 8-1
Competitive Procurement Methods

Purchasing Methods	Method Description
Competitive bidding	Requires that bids be evaluated and awarded based solely upon bid specifications, terms and conditions contained in the request for bids, bid prices offered by suppliers and pertinent factors affecting contract performance. Forbids negotiation of prices of goods and services after the proposal opening.
Competitive sealed proposals	Requires the same terms and conditions as competitive bidding, but allows changes in the nature of a proposal and prices after the proposal opening.
Request for proposals	Generates competitive sealed proposals and involves several key elements, including newspaper advertisement, notice to proposers, standard terms and conditions, special terms and conditions, a scope-of-work statement, an acknowledgment form/response sheet, a felony conviction notice and a contract clause.

Catalog purchase	Provides an alternative to other procurement methods for the acquisition of computer equipment, software and services only.
Interlocal contract	Provides a mechanism for agreements with other local governments, the state or a state agency to perform governmental functions and services.
Design/build contract	Outlines a method of project delivery in which the school district contracts with a single entity for both the design and construction of a project. (The "single entity" is usually a team of firms including a general contractor, architect and sometimes an engineer. One firm rarely does both the design and the construction.)
Job order contracts	Provides for the use of a particular type of contract for jobs (manual labor work) for minor repairs and alterations.
Construction management contracts	Outlines the use of a contract to construct, rehabilitate, alter or repair facilities using a professional construction manager.
Reverse auction procedure	Outlines a bidding process that involves submission of bids by multiple suppliers, unknown to each other, in a manner that allows the suppliers to bid against each other.

Source: Texas Education Agency (TEA), Financial Accountability System Resource Guide, 2000 and Legislative Briefing Book, 2001.

In 1999, the Office of the Attorney General issued an opinion (Op. JC-37) stating that school district procurement through an interlocal agreement or a cooperative purchasing arrangement satisfies competitive bidding requirements. Under an interlocal agreement, a district can contract or agree with another local government, including a nonprofit corporation created and operated to provide one or more governmental services, to purchase goods and services reasonably required for the installation, operation or maintenance of the goods.

School districts must advertise bids for purchases worth $25,000 or more at least once a week for two weeks in any newspaper published in the county in which the district is located. Those between $10,000 and $25,000 must be advertised in two successive issues of any newspaper in the district's county. The TEC requires advertisements to specify the categories of property the district will purchase and to solicit vendors who are interested in supplying them.

Exceptions to competitive bidding requirements include contracts for professional services, including architects, attorneys and fiscal agents. The

TEC also allows a district to purchase items available from only one source ("sole-source" purchases) if certain criteria are met, including:

- an item for which competition is precluded because of the existence of a patent, copyright, secret process, or monopoly;
- a film, manuscript, or book;
- a utility service including electricity, gas, or water; or
- a replacement part or component for equipment that is specific to a particular piece of equipment and not available from more than one vendor.

To properly use the sole-source arrangement, a school district must obtain and retain documentation from the vendor that clearly states the reasons the purchase requires a sole-source. Sole-source exceptions do not apply to mainframe data processing equipment and peripheral attachments with a single item purchase price of more than $15,000.

Exhibit 8-2 presents a summary of state-mandated purchase and bid approval processes based on purchasing guidelines included in the TEC.

Exhibit 8-2
Bid and Purchasing
State-Mandated Approval Process

Purchase Levels	Bid Requirements (if no bid or contract exists)	Approval Requirements
$25,000 and more	Formal sealed bid	- User department/school approvals - Purchasing director - Superintendent or designee board of trustees
$10,000 to $24,999	Formal quotations from three vendors (written and sealed)	- User department/school approvals - Purchasing director - Superintendent or designee
$5,000 to $9,999	Quotations from three vendors (telephone, fax or written)	- User department/school approval - Purchasing agent
$0 to $4,999	Quotations from one to three	User department/school

	vendors (telephone, fax or written)		• approval • Purchasing clerk

Source: Texas Education Code 44.031(a), (b).

Texas Education Agency (TEA) regulations allow districts to purchase computer hardware and software several ways:

- districtwide bids for computer hardware, software and printer needs. Vendors can be contacted directly by school and department personnel for pricing and technical guidance;
- purchases made through the Texas Department of Information Resources (DIR). Schools and districts can purchase a variety of software through DIR's Web site at competitive prices; and
- purchases made through the Texas Building and Procurement Commission (TBPC) -Qualified Information Systems Vendors (QISV) catalog purchases. The QISV Purchasing Program uses methods such as rotation of qualified vendors and limiting proprietary specifications to allow schools to purchase products and services in a cost effective and efficient manner. Purchases of computers, software, technology services and peripherals not available through a district bid are made through QISV catalog solicitations.

The BISD Purchasing Department falls under the direction of the Interim Chief Financial Officer. The department is staffed with 19 positions as depicted in **Exhibit 8-3**. The Purchasing administrator oversees the day-to-day operations of the Purchasing Department and is supported by a Purchasing specialist, three senior buyers, three junior buyers, a bid clerk, a bid control accountant, six office clerks, a records management clerk, a secretary and a receptionist.

Exhibit 8-3
BISD Purchasing Organization

2002
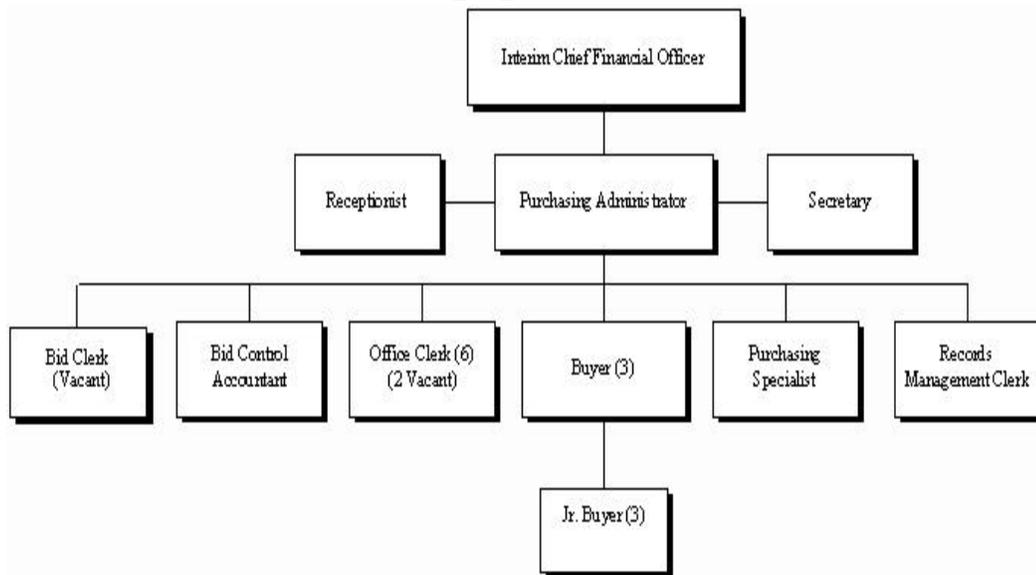
Source: BISD Purchasing Department, September 2002.

The Purchasing Department makes the district's purchases with the exception of Food Services. Food items used in the school cafeterias are ordered by the Food Services Department. The Purchasing Department is located in the district's main administration building at 1900 Price Road.

The district uses a financial accounting system called Information Design. However, BISD relies on a manual process for procurement and does not use the automated purchasing features of this system.

All schools and departments must type purchase requisitions on a requisition formwhen ordering goods and supplies. The principal or department head approves these requisitions and then forwards them to the appropriate area superintendent and program managers before submitting them to the Purchasing Department. Once the Purchasing Department receives the purchasing requests, it logs them into a tracking database, so that departments and schools can track purchase requisitions as they progress through the system. Staff then reviews requisitions to determine whether the initiating department used the correct budget coding. Staff then enters purchase requisitions into a second database that tracks bid control. After the staff verifies all data on the requisition, they turn the requisition into a purchase order and encumber the funds.

BISD's purchasing policies require that all purchases valued at $25,000 or more in the aggregate for each 12-month period be made by competitive bidding, competitive sealed proposals, request for proposals, catalog purchases or through interlocal agreements, with the exception of purchases for produce or vehicle fuel.BISD's Board policy further requires

that the board must approve all purchases that cost or aggregate to a cost of $10,000 or more.

FINDING

Despite board policies and internal procedures for procurement, BISD does not have adequate controls in place to ensure compliance with state purchasing laws. A review of documentation and observations made during on-site visits of the district revealed several violations of board policy and state law. As a result of these violations, the district has been investigated for its procurement practices.

Exhibit 8-4 shows recent investigations of BISD procurement practices and the agency performing the investigation.

Exhibit 8-4
BISD Procurement Investigations 2002

Date of Investigation	Agency	Description	Status
2001-02	BISD Internal Audit	Investigation into administrative and board travel expenditures for the period of 1995-96 to 1999-2000.	Investigation completed January 2002. Reported to TEA and Cameron County District Attorney.
May 2002	Richard Mendoza, CPA	BISD hired audit firm to review bidding practices associated with the district's insurance policies.	BISD terminated the investigation prematurely on June 11, 2002. Investigation was never completed but preliminary report issued.
September 2002	Cameron County Grand Jury	Inquiry into insurance procurement and travel expenditures.	Ongoing.
September 2002	TEA	Investigating purchasing practices.	Ongoing. Report expected in November 2002.

Source: Interviews with BISD staff and TEA auditors, review of reports and news articles, September 2002.

In addition to the audits and investigations listed in the **Exhibit 8-4,** the district's Internal Audit Department has reviewed the purchasing function

several times. The Internal Audit Department released its most recent audit on April 19, 2000. The audit found, among other things, that "the Purchasing Department's overall internal control structure is unsatisfactory." The district's internal auditor's tests indicate critical weaknesses in management's risk assessment, control activities, information and communication and monitoring.

In 2000, an employee identified what appeared to be inappropriate travel expenditures by board members holding office at that time. Further review conducted by the district's internal audit division, revealed that board members and some administrative staff were traveling at the district's expense and incurring hotel and meal expenses that were beyond what was considered to be reasonable. For example, hotel accommodations for a trip in 2000 to Orlando, Florida amounted to over $400 per night. In addition, board members also incurred ineligible expenses such as amusement park tickets and some board members took family members along with them at the district's expense. After an internal investigation, which was turned over to the Cameron County District Attorney and to TEA, the district established polices and procedures so that it could prevent these abuses. In a letter to TEA dated January 10, 2002, the superintendent stated "...we have not tried to fix the blame on individual board trustees, when it appears that the past administration was not properly monitoring and implementing board travel policy."

Although the district established policies and procedures as corrective action, examination of district travel expenditures show that these policies and procedures are not always followed. For example, as a part of the corrective action, the board secretary, who had processed the travel expenditures under investigation, was to no longer handle travel functions. In addition, as an added control, both the superintendent and the chief financial officer were required to approve any travel requests. However, review of documentation of July 2002, shows that the board secretary continues to be involved in travel reimbursement requests.

In 2001, district staff found that the district did not bid BISD's insurance policies as required by state law. In addition to not bidding the insurance, the district purchased $1.8 million of insurance coverage in 2001 that was not approved by the school board, as required by district policy. To address these concerns, the district signed an engagement letter on May 21, 2002, with an independent audit firm to conduct an investigation into the insurance bidding practices. The investigation was to cover the period of April 1, 1998 through March 31, 2002. However, district management stopped the investigation prematurely on June 11, 2002. In spite of the suspension of the investigation, a preliminary report was issued regarding findings to date. The report stated that the district's initial conclusions were correct in that the district did not procure insurance policies through

proper bidding procedures and that the board did not give its approval in the procurement of those policies.

Other purchasing problems experienced by the district include the failure to obtain bids for items over $25,000 and failure to obtain written quotes for items between $10,000 and $24,999. The district makes frequent use of local vendors such as HEB, Wal-Mart, Sam's Club and McCoy's Building Materials without proper bids and quotes in place. Amounts paid to these local vendors in 2001-02 were $129,000 to HEB, $176,000 to Wal-Mart, $95,000 to Sam's Club and $19,000 to McCoy's Building Materials. In a meeting with BISD, district management provided the review team with documentation for 2002-03 bids for general merchandise, districtwide printing and groceries and supplies in the amount of $500,000, which will correct this problem for these specific vendors and commodities for the future.

In addition, the district did not always follow proper bid practices, allowing bidders to submit bids after established bid deadlines. In accordance with the district purchasing policies and procedures, each bid shall be placed in a separate envelope, sealed and properly identified with the bid title and number. The bidder should also include the bid opening time and date on the outside of the envelope, and bids must be received in the Purchasing Department before the hour and the date specified. The district states that it will not consider late bids under any circumstances. A review of district files showed that one vendor supplying the district with athletic equipment was routinely allowed to submit bids after the due date. This practice presents the opportunity for the late bidders to obtain confidential bid information supplied by competing vendors, giving the late vendors an advantage.

These examples illustrate that the district has identified problems with purchasing practices and has attempted to remedy the deficiencies. District efforts to date include removing the former purchasing administrator, initiating an internal investigation into purchasing practices and providing a careful review of purchase orders.

In March 2002 the district assigned a new Purchasing administrator to oversee the department. The administrator still faces significant obstacles to achieving a sound system of internal controls. Foremost, the district's purchasing system is not automated. All purchase requisitions are submitted on typed forms, leaving the purchasing staff an overwhelming task of entering all purchases into the accounting system. Automated reports that would streamline review of purchasing practices are not available. Because of the lack of automation, purchasing staff spends its time processing purchasing documents, rather than checking for policy adherence and taking corrective action when policies are not followed.

As addressed later in this chapter, the review team also found that the purchasing staff has not received adequate training. This limits the department in its ability to identify, monitor and correct internal control deficiencies. Therefore, even though the department is overstaffed, it cannot provide adequate support for the purchasing function.

Organizations that have strong internal controls in place have fewer problems complying with purchasing laws and regulations. Internal controls are an organization's policies and procedures that protect its assets and the integrity of financial records from error, disaster or fraud. Internal controls ensure that transactions are authorized by those with the proper authority to do so, that records of the assets accurately reflect actual assets in place, that financial transactions are accurately and properly recorded and that assets are properly safeguarded.

In a purchasing environment, internal controls take several forms. For example, purchasing controls should specify which hierarchical levels must approve purchase orders and contracts, with a specific dollar limitation for each level. Good controls also specify requirements that must be met before a payment can take place, such as having a properly approved purchase order in place in a timely manner and having properly approved receiving documents.

In addition to sound internal controls, good purchasing procedures require a system for monitoring purchasing practices and for taking corrective action when necessary. Finally, all controls need the support of upper management so that all individuals in the organization understand and respect their importance.

Recommendation 70:

Develop and implement purchasing procedures that include a system of internal controls and specific sanctions for non-compliance.

The district should implement procedures for detecting improprieties within the purchasing system. When such instances are detected, Purchasing Department staff should bring them to the attention of the superintendent and the school board. The board should immediately address the improprieties with appropriate district personnel, supporting the importance of district employees taking these issues seriously. Procedures should include a progressive system of addressing violations, such as counseling the offending employee upon the first occurrence of a violation, up to termination for repeated or severe offenses.

The Purchasing Department should implement procedures to compare invoice dates to purchase order dates to detect purchases made without

proper approval or budgetary control. A department should also implement a procedure to review a proposed vendor's prior performance before issuing purchase orders to ensure that the district's purchasing policy is followed. The department should adhere to processes such as time and date stamping of all bids and public bid openings to ensure that bid requirements are followed.

The department should develop a procedure for monitoring purchasing volume to determine which items reach the $25,000 threshold and therefore must be bid and presented for board approval.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent directs the chief financial officer to develop purchasing procedures that include a system of internal controls.	March 2003
2.	The chief financial officer develops a system of internal controls for purchasing.	April 2003
3.	The chief financial officer and the Purchasing administrator develop a training program on the new procedures for all employees and board members.	July 2003
4.	The Purchasing administrator conducts the training for all employees.	August 2003
5.	The Purchasing administrator begins putting the new controls in place, including taking corrective action when policy violations occur.	August 2003
6.	The chief financial officer and the Purchasing administrator review the procedures annually, make any necessary adjustments and conduct training.	Annually
7.	The chief financial officer directs the purchasing agent to attend training classes to stay informed of purchasing laws and regulations.	Annually

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 8
PURCHASING AND WAREHOUSING

A. PURCHASING (PART 2)

FINDING

BISD's purchasing process is manual, cumbersome and results in delays in the procurement of goods and services in the district. Although the district's software has an automated purchasing feature, it is not being used. The feature allows for decentralized entry of purchase requisitions and electronic approval routing. With the automated system, schools and departments have the option of entering their purchase requests directly into the system, rather than typing a paper requisition that purchasing department staff must enter into the financial system. An automated system can then electronically route the purchase request to a pre-established approver for authorization.

According to the district's Purchasing Procedures Manual, staff must type all purchase requests and obtain approval before submitting them to the Purchasing Department. A purchase request must go through as many as five levels of approval before being submitted to the Purchasing Department. These five approvals include the department administrator or principal, assistant or area superintendent if it requires special funds, program director and program administrator and state or federal program administrator if it is for a federal or state program. After the Purchasing Department receives the purchase request, it must receive up to three additional approvals from the Fixed Assets/Warehouse and Textbook Administrator, the junior buyer and another Purchasing Department administrator if fixed assets are involved. The review team found requisitions with as many as eight approval signatures.

The Purchasing administrator estimates that once the Purchasing Department receives a purchase request, the normal processing turn-around time is two days to a week. The actual elapsed time from the item's request to receipt is often much longer because of the number of approvals required prior to submitting requests to the Purchasing Department. In one instance, the process for purchasing a Dell computer required 10 weeks from the time the board approved the computer purchase to the time the Purchasing Department authorized the purchase order. A school performance review conducted by TSPR in 1994 also indicated that the purchasing process took several weeks because of the number of approvals required for the purchasing process.

After the typed purchase request has received all approvals and is processed by the Purchasing Department, purchasing staff enters the information into the automated financial system. The Purchasing Department enters account numbers, dollar amounts and vendor information. The requesting department or school could enter this information but is unable to since the software module is not in operation. In addition to being inefficient, this practice causes problems with monitoring department and school budgets. Because it takes so much time to approve and enter a purchase order into the system, budget reports are often inaccurate. For example, when a school receives a budget monitoring report at month end, its remaining budget totals may not reflect purchase requisitions still working their way through the approval system. Due to the lack of automation, schools and departments find it difficult to know at any given point in time their accurate budget and expenditure-to-date amounts.

Interviews with principals, department heads and department staff revealed a high level of dissatisfaction with the procurement process. The review team heard numerous accounts of requisitions taking weeks to go through the approval and review system, only to find out that if the requisition has an error that needs correcting, the requisition has to be returned to the department and the process must begin again. A high school administrator submitted a requisition in August 2002 and received it back four weeks later because of a requisition deficiency. The Purchasing Department asked the administrator to resubmit the request and begin the process all over again.

Exhibit 8-5 presents selected results of a TSPR survey of randomly selected BISD teachers, administrators and principals. Responses regarding the district's purchasing process confirm what the review team heard in interviews with staff. As the exhibit shows, of those responding to the survey, 55 percent of teachers, 22 percent of administrators and 65 percent of principals either disagreed or strongly disagreed with the statement "Purchasing gets me what I want when I need it." A significant percentage of administrators - 43 percent - answered no opinion to this statement, indicating that many of them may not have regular contact with the purchasing process. Forty percent of teachers, 39 percent of administrators and 61 percent of principals responded that they either disagreed or strongly disagreed with the statement, "Purchasing processes are not cumbersome for the requestor."

Exhibit 8-5
BISD Survey Results for Purchasing
2002

Teachers

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Purchasing gets me what I want when I need it.	3.2%	24.7%	15.2%	39.2%	15.8%	1.3%
Purchasing acquires the highest quality materials and equipment at the lowest cost.	3.2%	26.6%	24.1%	28.5%	16.5%	1.3%
Purchasing processes are not cumbersome for the requestor.	1.9%	25.9%	29.1%	24.7%	15.2%	3.2%
Vendors are selected competitively.	4.4%	30.4%	39.9%	15.8%	8.2%	1.3%

Administrators

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Purchasing gets me what I want when I need it.	2.0%	31.8%	43.2%	13.5%	8.8%	0.7%
Purchasing acquires the highest quality materials and equipment at the lowest cost.	3.4%	27.7%	21.6%	24.3%	22.3%	0.7%
Purchasing processes are not cumbersome for the requestor.	2.7%	27.7%	30.4%	20.3%	18.9%	0.0%

Principals

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Purchasing gets me what I want	0.0%	34.8%	0.0%	43.5%	21.7%	0.0%

when I need it.						
Purchasing acquires the highest quality materials and equipment at the lowest cost.	0.0%	17.4%	21.7%	34.8%	26.1%	0.0%
Purchasing processes are not cumbersome for the requestor.	0.0%	21.7%	17.4%	30.4%	30.4%	0.0%

Automated purchasing systems allow users to streamline the procurement process. Data entered for a purchase requisition can be used to create purchase orders without duplicative data entry. An electronic system can save recurring standard purchases, reducing data entry even further. Electronic approval features of automated purchasing systems allow users to establish pre-defined approval paths that electronically route the purchase request to the appropriate individuals for approval. BISD is waiting to automate the purchasing process until it implements a new financial system. However, the district has not taken the initial steps toward procuring a replacement financial system, and it could take up to two years to implement a new system.

Other school districts have developed processes to automate the procurement of goods and services and to streamline the amount of approvals required for purchase requisitions. For example, Spring ISD (SISD) provided all schools and departments with online access to the purchasing requisition system. SISD's system allows users to enter purchase requisitions directly into the system and electronically transfers requests to the necessary individuals for approval.

Port Arthur ISD (PAISD) also implemented an automated purchasing requisition system that allows users to initiate orders from their school or department. The system electronically transmits the requisition to the appropriate individual for approval. After approval, the system transfers the requisition to the Purchasing Department for processing. In PAISD, a requisition only requires the approval of the principal or department head and the appropriate assistant superintendent. PAISD's streamlined process takes one day to issue, approve and process a purchase request.

Recommendation 71:

Automate the requisition process by implementing existing system capabilities and streamline the process required for purchase order approval.

By implementing an automated purchasing process and streamlining the approval process, BISD could reduce the amount of time and effort required to process purchasing requisitions. BISD can streamline the requisition process by cutting down on the number of required signatures for purchase requisitions, establishing performance standards such as processing requisitions within two days of receipt and by implementing processes to resolve requisition deficiencies in the most effective and efficient manner such as e-mailing or telephoning the originator of the request.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer directs the Purchasing administrator to prepare an implementation plan for the electronic procurement system.	March 2003
2.	The Purchasing administrator meets with the Computer Services administrator to discuss the implementation plan and develops a timeline.	April 2003
3.	The Purchasing administrator develops an implementation plan that includes detailed implementation steps, a reduction on the number of approval signatures, training schedules and overall timelines.	June 2003
4.	The chief financial officer reviews and approves the implementation plan.	July 2003
5.	The Computer Services Department staff provides the Purchasing Department employees with the necessary training for the implementation of the automated purchasing system.	July 2003
6.	All other purchasing system users in the district receive training on the automated purchasing system.	August 2003

7.	The Purchasing administrator implements the system.	August 2003

FISCAL IMPACT

The district's current financial system already has a purchasing module. Therefore, this recommendation can be implemented with existing resources.

FINDING

The Purchasing Department is not appropriately staffed or trained. The department is overstaffed when compared to the peer districts, and none of the job descriptions for the positions of the Purchasing Department require purchasing certification. Finally, previous job-related experience requirements are inadequate and department employees do not receive adequate training.

Exhibit 8-6 displays staffing levels for BISD's Purchasing Department compared to the peer districts. BISD's Purchasing Department employs significantly more staff than most of its peers, particularly when taking into consideration student enrollment. North East ISD, for example, has a higher student enrollment than BISD, yet 53 percent fewer purchasing staff members.

Exhibit 8-6
Purchasing Department Staffing Levels
BISD vs. Peer Districts
2001-02

District	Total Purchasing Staff	Student Enrollment
Brownsville	**19**	**42,541**
Corpus Christi	9	39,383
Laredo	9	23,188
North East	9*	53,030
Plano	8	48,944
Ysleta	12	46,742

Exhibit 8-7 shows each position in the Purchasing Department with the educational and experience requirements for each position. The Purchasing administrator, Purchasing specialist and bid control accountant positions all require at least a Bachelor's degree. The other positions require college degrees or certification and only require three to six months previous experience.

Exhibit 8-7
BISD Purchasing Department Position Listing

Position	Educational Prerequisites	Experience Prerequisites
Purchasing Administrator	Master's Degree	Five years
Purchasing Specialist	Bachelor's Degree	Four years
Bid Control Accountant	Bachelor's Degree	Three years
Buyer	High School Diploma or GED	Three to six months
Junior Buyer	High School Diploma or GED	Three to six months
Office Clerk	High School Diploma or GED	Three to six months
Records Management Clerk	High School Diploma or GED	Three to six months
Bid Clerk	High School Diploma or GED	Three to six months
Secretary	High School Diploma or GED	Three to six months
Receptionist	High School Diploma or GED	Three to six months

Although the bid control accountant and the purchasing specialist meet the requirement of having a Bachelor's degree, the Purchasing administrator

does not meet the district's job description requirements of having a Master's degree and five years of purchasing experience.

BISD's Purchasing Department has a receptionist who manages people coming into the office and six office clerk positions. Two clerk positions are vacant. According to the department's job descriptions, the remaining four positions' main functions are to:

- to distribute purchase orders to the appropriate schools and departments;
- to manage advertisement of the bids;
- to check accounts to make sure schools and departments have money in their accounts and they are using the right account numbers; and
- to assist staff on issues regarding all office equipment including telephones and data lines.

In addition, Purchasing Department staff members are not adequately trained. The Purchasing administrator reported to the review team that all buyers and junior buyers attend the National Association of Purchasing Management (NAPM) training annually; however, the NAPM training is once a year and does not provide a certification program. A review of the department's budget shows that for 2000-01, $2,360 was budgeted for training. This amounts to about $130 per person per year for training.

The lack of adequate experience and training has led to several problems in the purchasing area. The review team heard numerous reports of purchase requests that are submitted to the Purchasing Department and may contain minor errors such as incorrect budget code or using the wrong vendor code. Rather than correcting the problem, or contacting the user department to inquire about the problem, the Purchasing Department denies the request and sends it back to the originating department. This practice indicates that the Purchasing Department has not trained its staff members on basic, recurring issues and has not empowered them to make simple corrections to purchase requests.

In another example, a user department told the review team that its department had submitted a purchase request for a furniture item. Several weeks passed, and the department had not received the furniture. After six weeks, the Purchasing Department told the user department that the vendor designated on the purchase request was not valid, and the user department needed to initiate the request again using the proper vendor. Upon questioning Purchasing Department staff about this incident, the review team learned that the delay in getting the furniture shipment was due to the district having to request furniture bids from vendors for a second time. A Purchasing Department employee informed one of the

furniture vendors of the bid amounts submitted by competing vendors. The employee did not understand that bid information is to be kept confidential until bids are officially opened at the designated time.

Recommendation 72:

Reorganize the Purchasing Department by upgrading job descriptions, providing training to staff and reducing excess staff.

A well-trained staff will allow the Purchasing Department to eliminate staff while improving efficiency and service to BISD departments.

If the district improves efficiency by implementing the automated purchasing system and provides better-trained staff members, it could eliminate the receptionist position and six office clerk positions. The receptionist spends a significant amount of time directing visitors to the Purchasing Department. The department receives a high amount of visitors because user departments find it necessary to deal with purchasing problems in person to expedite their procurements. If the Purchasing Department were more efficient and accurate, user department employees would not find it necessary to appear in person to resolve problems.

To accomplish this recommendation, the district needs to invest in more training for all Purchasing Department employees. Purchasing training is provided by TASB, the Texas Association of School Business Officials (TASBO), Texas Building and Procurement Commission (TBPC) and from Regional Education Service Center I (Region 1). TASBO offers certification programs for school district personnel. The number of classes needed to meet certification requirements varies depending upon the employee's position and the certification level sought. Typically seven to 12 classes are required for basic certification. Once TASBO certifies staff, it requires regular classes to maintain the certificate. Personnel can obtain the TASBO certification in two to three years. TBPC also offers public purchasing courses and certification programs. The TBPC training and certification program contains three levels of training and two levels of certification. To grant certification, TBPC requires purchasing experience, completion of courses and passing the written exam. The number of courses and the years of experience requirements vary depending upon the certification sought. TBPC also requires regular classes to maintain the TBPC certifications.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer puts in a hiring freeze and directs the Purchasing administrator to rewrite the Purchasing Department's employee job descriptions.	March 2003

2.	The Purchasing administrator, in consultation with the Human Resources Department, rewrites the employee job descriptions.	May 2003
3.	The chief financial officer approves the employee job descriptions.	June 2003
4.	The chief financial officer directs the Purchasing administrator to develop a plan for eliminating seven positions.	June 2003
5.	The Purchasing administrator eliminates the positions.	August 2003
6.	The Purchasing administrator identifies training opportunities that offer certification programs and begins to send staff to training.	September 2003 and Ongoing

FISCAL IMPACT

The fiscal impact of eliminating seven Purchasing Department personnel includes the actual salaries of the positions being eliminated plus 12 percent variable benefits and $3,483 in fixed benefits annually.

The savings of eliminating the receptionist position totals $18,818 [($13,692 annual salary x 1.12 variable benefits) + $3,483 fixed benefits] and the savings for elimination of the six office clerk positions is $130,871 [($16,365 annual salary x 1.12 variable benefits) + $3,483 fixed benefits) x 6 positions]. The total fiscal impact for salary savings, therefore, is $149,689 ($18,818 + $130,871).

Training classes range from $80 to $100 per class. Key Purchasing staff should take at least two classes annually. Annual costs, including travel, will total approximately $500 per person ($100 per class x 2 classes = $200 + $300 travel costs = $500 per person). Nine Purchasing Department employees should attend training. The annual cost of training will be $4,500 ($500 x 9).

The total annual savings of eliminating excess positions and incurring training costs is $145,189 ($149,689 salary savings - $4,500 training costs).

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Reorganize the Purchasing Department by upgrading job descriptions, providing training to staff and	$145,189	$145,189	$145,189	$145,189	$145,189

reducing excess staff.					

Chapter 8
PURCHASING AND WAREHOUSING

B. WAREHOUSE SERVICES

An efficient warehouse operation should ensure that all purchases and deliveries to schools and units are complete and timely; inventory levels are sufficient to meet requests for supplies from individual schools and units; property and equipment are accounted for properly and controlled; and surplus or obsolete property is disposed of properly and removed from district records.

The central supply warehouse, located at 1922 Price Road, just behind the district's administration building, occupies 31,725 square feet. In addition to the central supply warehouse, the district also maintains another supply warehouse, a Food Service warehouse and leases additional storage space.

Exhibit 8-8 shows the locations and stock lines for all district warehouse facilities.

Exhibit 8-8
BISD Warehouse Facilities
2002

| Warehouse	Location	Stock Lines	Square Footage	Annual Lease Payment
Central Warehouse	1922 E. Price Rd.	Janitorial, consumable and textbook supplies.	31,725	$0
Rockwell Warehouse	2524 Rockwell Dr.	Inventory stock furniture and media center paper.	9,925	$0
Fronton Warehouse	534 E. Fronton St.	Inventory stock furniture and surplus/obsolete equipment.	10,000	$27,600
Boca Chica Warehouse	3055 Boca Chica Blvd.	Food Services Equipment	11,300	$52,884
Total			**62,950**	**$80,484**

Source: BISD Warehouse, September 2002.

The district's warehouse operation falls under the direction of the Area 2 superintendent. The warehouse has 34 positions as shown in **Exhibit 8-9**.

In addition to the functions of warehouse and central receiving operations, the department is also responsible for textbooks, fixed assets, and custodial operations.

Exhibit 8-9
Warehouse/Textbooks and Fixed Assets Organization
2002

Area 2 Superintendent

Administrator Warehouse/Textbooks/Fixed Assets

Warehouse/Text/FA* Specialist

Warehouse/Text/FA Specialist

Receptionist

Coordinator Warehouse/Text/FA

Supervisor Custodial Services

Warehouse Supervisor

Property Control Supervisor

Clerical Assistant III

Warehouse Clerk III

Warehouse Person

Property Control Clerk (2)

Textbook Clerk (vacant)

Fixed Assets Clerk (3)

Receiving Clerk

Driver (vacant)

Property Control Clerk (vacant)

Warehouse Clerk (2)

Fixed Assets Clerk (vacant)

Warehouse Helper

Driver (4)

Warehouse Clerk (4)

Warehouse Clerk (Vacant)

The district's warehouse stocks a variety of items including paper, pens, pencils and art supplies. The central supply warehouse has a "cool" room that maintains a temperature of 78 degrees. The district stores books, pens, paints and other items affected by heat and humidity in this room.

All goods delivered to the district are received centrally. The Warehouse staff receives all goods ordered in the district, which they log, count and sign for. They then distribute the ordered goods to the appropriate school or department. The warehouse uses an automated receiving and tracking system that allows for efficiencies in the receiving process.

The Warehouse publishes and updates an annual catalog for all schools and departments. The catalog describes all items stocked in the warehouse and includes pricing and stock number information. All schools and departments requisition goods from the central warehouse through an automated requisition system. Based on the orders received through the online warehouse system, Warehouse workers pull the items from shelves and deliver the items to schools and departments. Upon filling the orders, the financial system automatically reduces the inventory quantities and charges the items against the requisitioning department's budget.

In addition to the deliveries made to schools and departments, the Warehouse moves all furniture and equipment throughout the district.

The value of the inventory at all supply warehouses as of August 31, 2002 amounted to $1,024,775. **Exhibit 8-10** shows the major categories of items stocked in all supply warehouses.

Exhibit 8-10
BISD Warehouse Inventory
2002

Inventory Category	Value
Consumable	$630,189
Furniture	$94,903
Janitorial	$226,731
Printer Supplies	$66,992
Telephones	$5,960
Total	**$1,024,775**

Source: BISD Inventory, September 2002.

Exhibit 8-11 shows BISD's fleet of vehicles and equipment used in the warehouse and distribution functions of the district.

Exhibit 8-11
Warehouse Vehicle Inventory
2002

| Year	Make/Model
1986	GMC Van
1991	Chevrolet Truck
1991	Chevrolet Van
1991	Chevrolet Van
1993	GMC Van
1994	Chevrolet Van
1995	Chevrolet Truck
1996	GMC Van High
1997	Dodge Truck Club Cab
1998	Ford Ranger Truck
1998	Ford Ranger Truck
1999	International Truck with small box
2001	Chevrolet Van
2001	Chevrolet Van
2001	Ford Truck
Not known	Nissan Forklift
Not known	Nissan Forklift

Source: BISD Fixed Assets Inventory, September 2002.

FINDING

BISD's Fixed Assets and Warehouse/Textbooks Department has an effective mechanism for safeguarding its central supply inventory, keeping losses due to theft and spoilage to a minimum. The Fixed Assets and Warehouse/Textbooks Department staff conducts monthly inventory counts throughout the year and adjusts inventory values as needed. For 2000-01 and 2001-02, the total inventory write-off amounts have been $14,640 and $7,240, respectively. The 2001-02 write-off amounted to 0.7 percent of total inventory value.

To conduct inventory counts, warehouse clerks are given inventory listings showing all items, but quantities on hand are deleted. This allows for a "blind" count of the goods on hand. Warehouse staff investigates any discrepancies to determine reasons for shortages. After Warehouse staff conducts the monthly counts, the department secretary sends a

reconciliation spreadsheet to the Finance Department to adjust the general ledger values to reflect actual inventory balances. **Exhibit 8-12** shows the monthly inventory procedures for the BISD Fixed Assets and Warehouse/Textbooks Department.

Exhibit 8-12
BISD's Monthly Inventory Procedures
2002
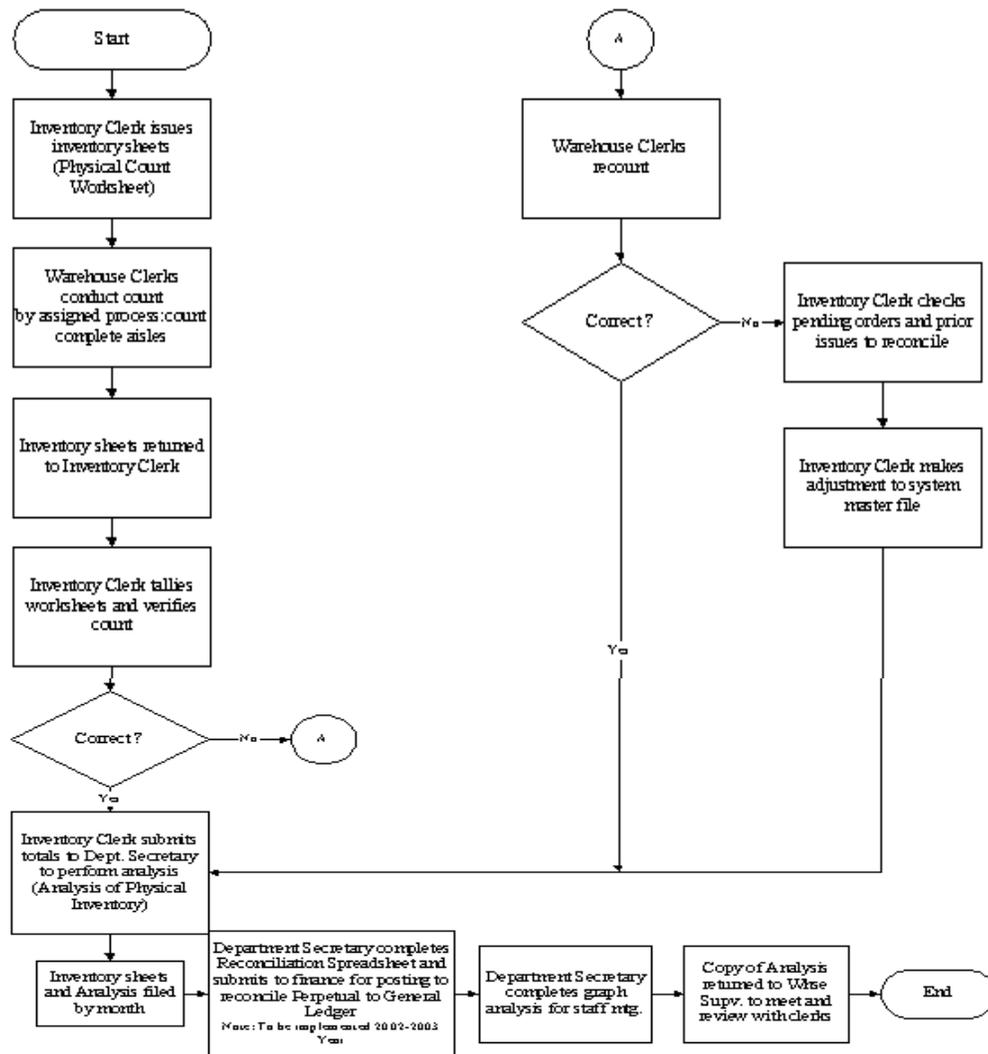
Source: BISD's Fixed Assets and Warehouse/Textbooks Department's policies and procedures manuals, September 2002.

The necessary adjustment ensures that book values of inventory reflect warehouse inventory balances. Adjustment percentages can also be an indication of how well an organization safeguards and accounts for its inventory stock. Generally, an inventory variance of less than 4 percent reflects an effective inventory control system

COMMENDATION

BISD holds inventory adjustments to a minimum by adequately safeguarding and accounting for warehouse inventories and conducting monthly inventory counts.

FINDING

The Fixed Assets/Textbooks and Warehouse Department uses an automated system that helps the department to receive, record, sort and deliver all items effectively and efficiently. The automated system creates internal delivery labels as it receives items for the warehouse. The internal delivery labels capture the carrier's tracking numbers and purchase order number of the item. The system also creates an internal delivery manifest that allows the staff to sort the items by delivery route. Warehouse drivers deliver internally labeled and sorted items to their destinations. The drivers use portable data collector devices to capture the signature upon delivery. The delivery data can be transferred from the portable data collector to the main system so that the warehouse staff can provide the district with the information about the delivery date, time and signature for the each delivery. The system also provides various reports for trend and performance analysis.

The system automates the flow of incoming items to their final destinations by recording information about each item as it comes to the warehouse. This allows the department to reduce delivery time. Also by keeping record of the detailed delivery information, the system increases staff accountability and reduces time spent verifying the delivery of an item.

The department conducts an annual customer service survey. The goal of the survey is to evaluate the level of service that the department provides and improve the areas that need improvement. Satisfactory results provide the department staff with a sense of pride and accomplishment.

The scoring system for the survey is as follows:

- Score 90-100 Exceeds expectations;
- Score 80-89 Acceptable; and
- Score 70-79 Requires improvement.

Exhibit 8-13 shows the 2000-01 survey results. The Warehouse department received the highest rating of exceeding expectations in nine categories.

Exhibit 8-13
Customer Service Evaluation
2000-01
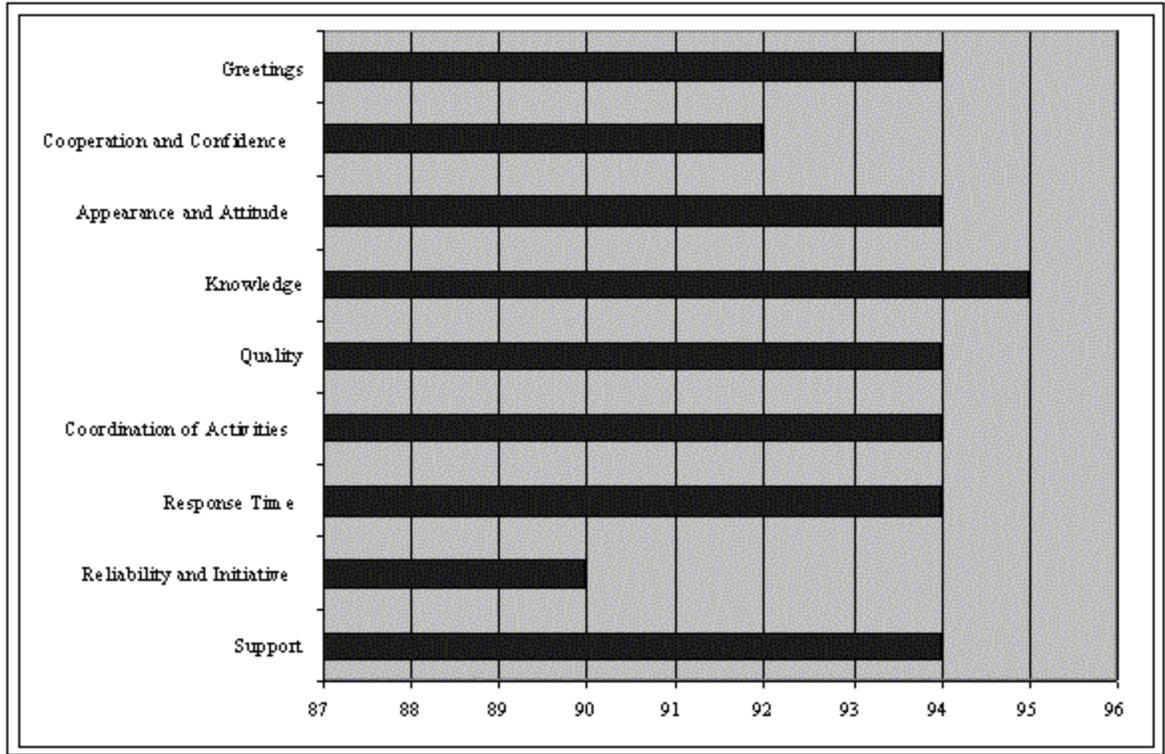
Source: BISD's Fixed Assets/Textbooks and Warehouse Department's Fixed Assets and Warehouse/Textbooks Department's survey results, 2000-01.

COMMENDATION

The Fixed Assets/Textbooks and Warehouse Department's operations are efficient and provide good customer service.

FINDING

The Fixed Assets/Textbooks and Warehouse Department's policies and procedures manuals are highly detailed and document every aspect of warehouse operations. The administrator of Fixed Assets/Textbooks and Warehouse and Purchasing created the policies and procedures in 1997. All 34 of the Fixed Assets/Textbooks and Warehouse staff use them. They contain flow charts, lists of procedures and all forms. **Exhibit 8-14** shows the elements covered by the two manuals.

Exhibit 8-14
Elements of the Warehouse Policies and Procedures Manuals
2002

Procedures manual	Policies manual
Campus procedure for the purchase and receipt of merchandise	Organizational chart
Receiving procedure for non-stock items	Communication and correspondence
Receiving procedure for stock items	Concerns and incident report
Returned and damaged merchandise procedure	Dress, appearance and uniforms
Fixed assets receiving procedure	Driving on school grounds
UPS special order receiving procedure	Gambling
Shipping procedure for non-stock items	Gossip
Shipping procedure for stock items	Mailroom pickup
Monthly inventory count procedure	Medical examination, drug testing and physical examination
Internal coding procedure	Outside employment
Internal purchase order review procedure	Paging and cellular telephones
Internal tagging procedure	Personal business, visits and phone calls
Internal payment procedure	Smoking, drug and alcohol policy
Internal shipment procedures	Timesheets, work schedules, lunches, breaks, absenteeism and tardiness
Fixed assets physical inventory audit procedure for schools	Valuables to work
Preparation of the fixed assets audit procedure	Accidents and incident vehicle
Data entry procedure	Injuries
Asset management and inventory control program procedures	Address and phone change notification
Report printing procedures	Code of ethics
Surplus and obsolete auction procedure	Comp time and overtime
Donated items procedure	Employee complaints and grievances

Fixed assets equipment transfer procedure	Job abandonment
Transferring fixed assets procedure	Job description and evaluations
Sale of surplus and obsolete real property procedure	Leave requests
Textbook annual inventory procedure	Resignation, termination and transfer requests
Interim surplus shipment and out of adoption procedures	Sexual harassment
Textbook state order procedure	State and local sick leave
Textbook campus order procedure	Fire drills, alarms and plans
Textbook timeline	Gates
Textbook adoption issues	General safety rules
Textbook return procedures	Material safety data sheets
Payment for textbook procedures	Safety belts
Textbook audits	Visitors into warehouse
Handbook for Textbook Inventory Program (TIP)	Equipment maintenance
All Textbook related forms	Equipment operation
All other forms	Driving requirements

Source: BISD Fixed Assets and Warehouse/Textbooks Department's policies and procedures manuals, September2002.

Interviews with the various department employees showed that they follow department policies and procedures manuals.

COMMENDATION

The Fixed Assets/Textbooks and Warehouse Department has a comprehensive and useful policies and procedures manual.

FINDING

A review of the Fixed Assets/Textbooks and Warehouse Department's inventory shows that the district stocks excessive supplies for a district the size of BISD. For example, as of August 30, 2002, some of the items

stocked in the district's supply warehouses included an inventory of art and office supplies such as poster board, scotch tape, scissors, crayons, pencil sharpener and highlighters with a value of $95,538; $226,731 of paper towels, toilet paper, various sizes of trash liners and other janitorial supplies; laminating film with a value of $30,559; Polaroid film with a value of $20,983; and clear transparencies valued at $31,950. The Fixed Assets/Textbooks and Warehouse Department also maintains a stock of new furniture with a value of $94,903 in a leased warehouse facility. The new furniture inventory includes 1,735 student and teacher chairs of various sizes, 1,430 student and teacher desks, 171 bookcases, 157 stools, 15 filing cabinets and 83 tables.

District management believes one of the reasons the districts' office inventory is high is because the district purchases from Region 4's Texas Cooperative Purchasing Network (TCPN), which ships the office supplies from Houston. However, TCPN's contract indicates a next business day turnaround for office supplies. According to the Purchasing Department, the district uses local vendors for janitorial supplies. Therefore, local vendors have many of the items stocked in the district's supply warehouses readily available or can deliver them within 24 hours. Just-in-time (JIT) deliveries allow organizations to order items such as office supplies and equipment and have them delivered to the user site, usually within one day.

Excluding the Child Nutrition Program's leased warehouse, the district spends $27,600 on warehousing costs each year as shown in **Exhibit 8-15**. Janitorial, consumable, some furniture, textbook and media center paper inventories use 41,650 square feet of two warehouses owned by BISD. The district meets all other warehouse needs with leased space. The lease space for the Fronton Warehouse will end on August 2003.

Exhibit 8-15
BISD Warehouses
September 2002

Warehouse	Square Footage	Annual Warehouse Lease Cost
Central Warehouse	31,725	$0
Rockwell Warehouse	9,925	$0
Fronton Warehouse	10,000	$27,600
Boca Chica Warehouse (Child Nutrition Commodities)	11,300	$52,884
Total	**62,950**	**$80,484**

Districts often use JIT inventory systems to maximize monies that could otherwise be invested. JIT means that supplies are ordered and delivered to the district only as they are needed, rather than being delivered in bulk. Robstown ISD implemented JIT delivery of supplies and materials and orders items when needed. The supplier delivers directly to the originator of the request.

Recommendation 73:

Eliminate the district's dry goods leased warehouse by ordering supplies and furniture on a just-in-time basis.

The administrators of Fixed Assets/Textbooks and Warehouse and Purchasing, along with the interim chief financial officer, should develop procedures for purchasing and delivering supplies on a JIT basis. The district should investigate with its vendors the possibility of ordering and contracting for supplies, with the delivery of supplies occurring throughout the year. During 2002-03, the district should phase out the leased warehouse operation. The district should analyze the items in inventory and eliminate all of them that can be acquired on a JIT, while continuing to acquire any specialty items in the current manner.

In 2002-03, the district should eliminate the 10,000 square feet of space used for furniture and surplus/obsolete equipment.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The administrator of Purchasing and the administrator of Fixed Assets/Textbooks and Warehouse evaluate the inventory to determine which items can be more appropriately phased in as a JIT purchase.	April 2003
2.	The administrator of Purchasing and the administrator of Fixed Assets/Textbooks and Warehouse present their proposal to the superintendent and board for approval.	May 2003
3.	The administrator of Fixed Assets/Textbooks and Warehouse, the Purchasing administrator and the interim chief financial officer develop procedures and revise contracts for a JIT delivery of supplies.	June 2003
4.	The administrator of Fixed Assets/Textbooks and Warehouse, or designee, updates the procedures manual and trains district	July 2003

		personnel on the JIT system.	
5.		The administrator of Purchasing and the administrator of Fixed Assets/Textbooks and Warehouse eliminate the district's leased warehouse.	August 2003

FISCAL IMPACT

With the implementation of a JIT system, the district could eliminate the 10,000 square foot warehouse for a savings of $27,600 each year beginning in 2003-04.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Eliminate the district's dry goods leased warehouse by ordering supplies and furniture on a just-in-time basis.	$27,600	$27,600	$27,600	$27,600	$27,600

Chapter 8
PURCHASING AND WAREHOUSING

C. TEXTBOOKS

Chapter 31 of the TEC spells out the rules and regulations for acquiring and distributing state textbooks. Section 31.001 of the code states that "textbooks selected for use in public schools shall be furnished without cost to the students attending those schools."

The Textbook Administration Division of the TEA coordinates the review, adoption, purchase and distribution of textbooks and other instructional materials for all Texas public schools and open-enrollment charter schools. After adopting suggested textbooks each year, TEA produces a recommended text list that it distributes to all Texas school districts. The TEA then loans books upon request to school districts. The TEA calculates the number of books allowed to each school district based on enrollment data by subject and grade. Districts submit enrollment data to the TEA through the Public Education Information Management System (PEIMS) reporting system. The TEA spends about $200 million annually on textbooks and instructional materials. School districts that require more textbooks than their enrollment data allows must purchase the additional books with district funds.

BISD has a textbook coordinator who oversees all textbook administration in the district. The coordinator controls all textbook activity within the district and with the TEA. The coordinator conducts surprise textbook audits, coordinates and accepts all incoming shipments of textbooks, maintains the textbook inventory records and collects and accounts for all funds for lost or damaged books.

Each school has a campus textbook custodian who oversees the textbook function at the school level. The school custodian coordinates with teachers and principals to ensure that all books are accounted for and that funds are collected and submitted to the textbook coordinator for lost or damaged books.

All issued textbooks are stored in book rooms located at each school. The central warehouse has limited capacity to store the excess books that have not been issued by schools.

The timeline presented in **Exhibit 8-16** shows an overview of the textbook functions in BISD.

Exhibit 8-16
BISD's Timeline for Textbook Administration

March	• Board meets to finalize its recommendations for local textbook selection. • District prepares orders for new and current textbooks.
April	• Deadline to submit textbook orders to TEA (April 1st). • Publishers begin annual textbook shipments on June 1st.
June, July, August	• District returns out-of-adoption textbooks. • District submits supplemental requests. • Publishers begin supplemental shipments.
September and October	• Publishers continue supplemental shipments.
January	• District receives annual requisition forms from TEA.

Source: BISD's Textbook Department Internal Procedures handbook, May 2002.

BISD uses an automated system to track and account for textbooks. The system, called the Textbook Inventory Program (TIP), tracks all textbooks issued by the Textbook department to each school, in addition to having "campus" modules that allow each school to track textbooks issued to students. The TIP system contains a feature that allows the district to interface with the Textbook division of TEA, allowing for the automatic transmission of annual and supplemental book orders and performing inventory checks. District policy does not require all schools to use the TIP system but recommends it.

FINDING

BISD has implemented a process to effectively control the number of lost textbooks in the district. The steps taken to control losses include developing a textbook procedures manual; implementing an automated textbook inventory system so that textbooks can be tracked by school and by student; implementing procedures to handle the transfer of textbooks between schools; performing periodic audits of textbooks; and establishing a policy for the collection of funds from parents when books are lost or damaged.

Exhibit 8-17 presents BISD's textbook losses by school type for the five-year period of 1996-97 through 2000-01. As this exhibit demonstrates, total textbook losses have declined by 18.7 percent for this period. Losses declined by $4,609 or 8.8 percent for the district's high schools during the five-year period. Middle school losses declined by $10,896 or 62.4 percent. Elementary school losses actually increased slightly for this time period by $681 or 7.3 percent.

Exhibit 8-17
BISD's Textbook Losses
1996-97 through 2000-01

School Type	1996-97	1997-98	1998-99	1999-2000	2000-01	Money Increase/ (Decrease) 1997 - 2001	Percent Increase/ (Decrease) 1997 - 2001
High Schools	$52,577	$43,660	$32,917	$29,347	$47,968	($4,609)	(8.8%)
Middle Schools	$17,466	$16,730	$10,063	$12,708	$6,570	($10,896)	(62.4%)
Elementary Schools	$9,367	$19,088	$9,249	$5,425	$10,048	$681	7.3%
Total	**$79,410**	**$79,478**	**$52,229**	**$47,480**	**$64,586**	**($14,824)**	**(18.7%)**

Source: BISD's Textbook Inventory Program reports, 1996-97 through 2000-01.

The district indicated that it further reduced its textbook losses numbers on all school levels in 2001-02. According to the 2001-02 numbers, high school losses were $10,374, middle school losses were $2,523 and elementary school losses were $8,583. Total loss for the 2001-02 year is $21,480. This number shows a 67 percent decline from a year ago number.

COMMENDATION

**BISD has effectively controlled its textbook losses.**

FINDING

BISD uses innovative processes to reduce the amount of funds expended on replacing lost, stolen or damaged textbooks. First, the district replaces lost books by purchasing quality used textbooks from used textbook suppliers. This practice can save districts up to 25 percent over the cost of replacing textbooks with new replacements.

Secondly, BISD has created a "textbook bank." Often parents will pay for a lost textbook, only to subsequently find the book the following year. The district takes these books and places them in the "bank." When a classroom needs additional books, the textbook coordinator checks the bank before purchasing replacement books. If the bank contains the books needed, the district does not have to purchase replacements.

Exhibit 8-18 compares BISD's textbook replacement expenditures to those of its peer districts.

Exhibit 8-18
BISD and Peer Districts
Textbook Replacement Expenditures
2000-01
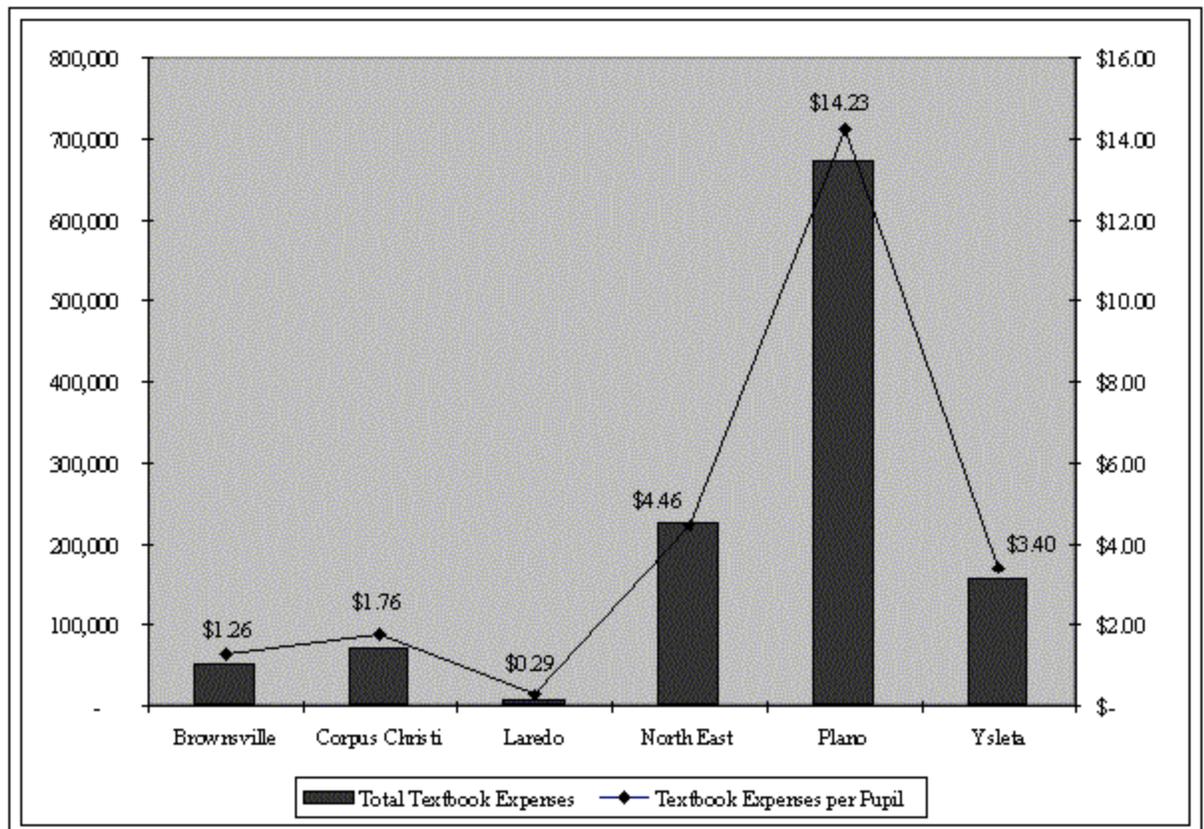
Source: TEA, PEIMS reports for object code 6321 - Textbooks, 2000-01.

As this exhibit shows, BISD's per pupil expenditures on textbook replacements is $1.26, ranking the district second among its peers for the lowest textbook replacement expenditure amount for this year.

COMMENDATION

BISD has effectively controlled the amount expended to replace lost, stolen and damaged textbooks.

Chapter 9
COMPUTERS AND TECHNOLOGY

This chapter reviews computers and technology within the Brownsville Independent School District (BISD) in the following sections:

A. Organization, Staffing and Budgeting
B. Policies, Procedures and Planning
C. Infrastructure, Software, Hardware and Operations

The responsibilities of technology-services operations in Texas public school districts vary. Some offices support administrative workers only, while others are responsible for supporting both administration and instruction. To achieve its technology-related goals, a school district must have an organizational structure that encourages using and supporting new technologies. A well-managed district technology and information service department must ensure that its basic structure is sound so that the department and its sub-departments can focus on their goals, not on structural makeup. For the department to run smoothly, it must have a clearly defined mission plan; appropriate goals and objectives; clearly assigned responsibilities; well-defined procedures for developing new applications; and a customer service-oriented staff that meets and anticipates user needs.

BACKGROUND

The district budgets more than $1.5 million a year from its general fund for technology-related expenditures. **Exhibit 9-1** lists technology expenditures for the three-year period of 1998-99 through 2000-01. The $1,566,817 spent in 2000-01 translates into $38 per student.

Exhibit 9-1
BISD Technology Expenditures
1998-99 through 2000-01

Object Description	1998-99	1999-2000	2000-01
Salaries or Wages-Teachers and Other Professional Personnel	$353,868	$401,166	$421,444
Extra Duty Pay/Overtime-Support Personnel			$4,686
Salaries or Wages for Support Personnel	$352,552	$351,458	$381,138
Social Security/Medicare	$8,545	$9,315	$9,754

Group Health and Life Insurance	$59,932	$55,435	$62,387
Workers' Compensation	$13,312	$14,050	$27,200
Teacher Retirement/TRS Care-On-Behalf Payments	$52,494	$61,111	$64,212
Unemployment Compensation	$1,848	$1,740	$598
Teacher Retirement/TRS Care	$2,306	$1,641	
Professional Services	$11,320	$30,062	$16,673
Contracted Maintenance and Repair	$400,168	$247,434	$242,576
Rentals/Operational Leases	$9,371	$4,741	$4,840
Miscellaneous Contracted Services	$18,672	$11,713	$9,347
Reading Materials	$3,355	$3,091	$2,337
General Supplies	$124,501	$163,873	$141,110
Travel and Subsistence-Employee Only	$47,587	$61,263	$57,666
Miscellaneous Operating Costs	$1,195	$3,524	$6,197
Vehicles		$34,448	
Furniture, Equipment, and Software	$10,300	$39,165	$14,653
Fixed Assets/Other/Locally Defined Groupings	$34,681	$78,536	$99,999
Total	**$1,506,007**	**$1,573,766**	**$1,566,817**

Source: Texas Education Agency (TEA), Public Education Information Management System (PEIMS), 1998-99 through 2000-01.

BISD spent the least amount on technology per student among its peer districts in 2000-01
(Exhibit 9-2).

Exhibit 9-2
Technology Expenditures
BISD vs. Peer Districts
2000-01

	Laredo	**Yselta**	**North East**	**Plano**	**Corpus Christi**	**Brownsville**
Total	**$1,323,168**	**$3,697,000**	**$2,496,791**	**$5,160,674**	**$4,108,828**	**$1,566,817**

Expenditures						
Enrollment	22,547	46,394	50,875	47,161	39,138	**40,898**
Per Student	$59	$80	$49	$109	$105	**$38**

Source: TEA, PEIMS, 2000-01.

Grants and local technology funds allowed the district to attain a 3:1 student-to-computer ratio for the entire district. The Texas Education Agency (TEA) created a *Long-Range Plan for Technology 1996-2010*, which set goals for the number of computers for each student in Texas classrooms. In the plan, TEA set short-term goals for 1997-1998, mid-term goals for 1999-2002 and long-term goals for 2003-2010. The plan's short-term goal is a student-to-computer ratio of four to one, while the mid-term goal is a student-to-computer ratio of three to one. Its long-term goal is a student-to-computer ratio of one to one.

Exhibit 9-3 compares BISD's student-to-computer ratio to its peer districts for 2001-02.

Exhibit 9-3
Student-to-Computer Ratio
BISD and Peer Districts
2001-02

District	Students	Instructional Computers	Student-to-Computer Ratio
Brownsville	**42,541**	**14,009**	**3:1**
Laredo	23,188	7,500	3:1
Yselta	46,742	13,000	4:1
North East	53,030	16,500	3:1
Plano	48,944	24,000	2:1

*Source: Peer districts, BISD documentation 2002 and TEA, PEIMS, 2001-02.*

Chapter 9
COMPUTERS AND TECHNOLOGY

A. ORGANIZATION, STAFFING AND BUDGETING

A school district is properly organized if it uses and supports existing and new technologies in its curriculum, learning activities, scholarship, research and district management. Effective organizations are those in which there is a clear assignment of responsibilities that are supported by the authority and resources required to implement them.

The BISD technology functions are distributed among three separate departments, namely the Computer Services Department, the Instructional Technology Department and the PEIMS Department (Public Education Information Management System). The Computer Services Department is responsible for all administrative computing in the district, including student and financial-accounting applications. The same department is also responsible for developing and generating various management reports, running reports for the PEIMS and providing hardware and software support for all administrative computers. The Computer Services Department administrator reports to the Area 3 superintendent. There are 21 positions in the Computer Services Department. **Exhibit 9-4** provides the organization chart for the Computer Services Department.

Exhibit 9-4
**Computer Services Department**
September 2002
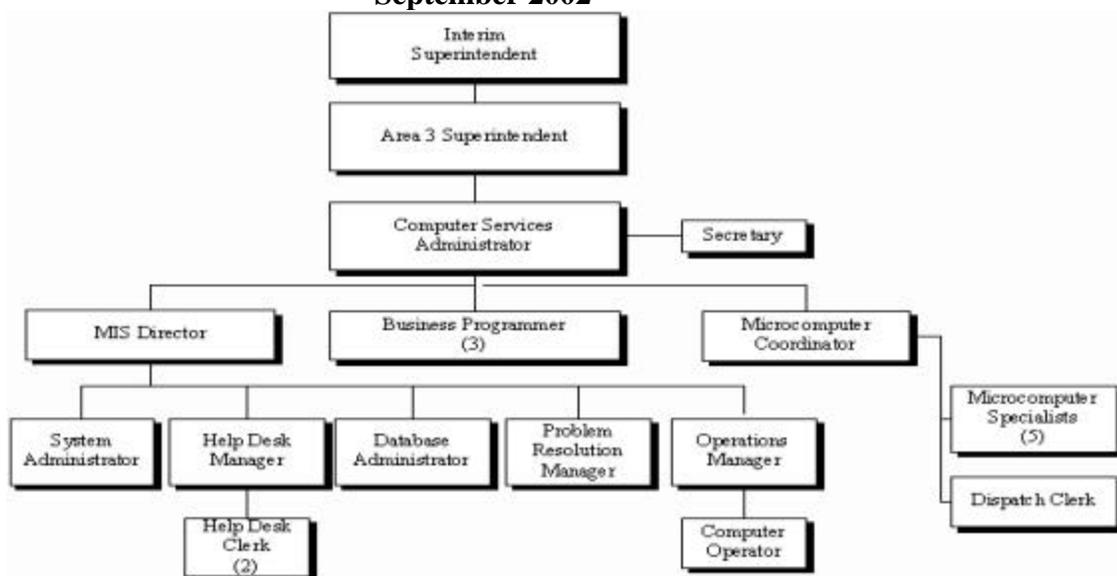
Source: BISD Computer Services Department organization chart, September 2002.

The Instructional Technology Department (ITD), which also supports BISD's technology functions, is responsible for:

- training instructional technology for teachers and staff;
- installation and support of all instructional hardware and software;
- managing and writing technology grants;
- designing, installing and supporting Local Area Networks (LAN) and the Wide Area Network (WAN); and
- maintaining and supporting e-mail services and the district Web site.

The ITD administrator reports to the Special Programs administrator, while the Special Programs administrator reports to the assistant superintendent for Curriculum and Instruction. There are 15 positions in ITD. **Exhibit 9-5** provides the organization chart for ITD.

Exhibit 9-5
Instructional Technology Department
September 2002
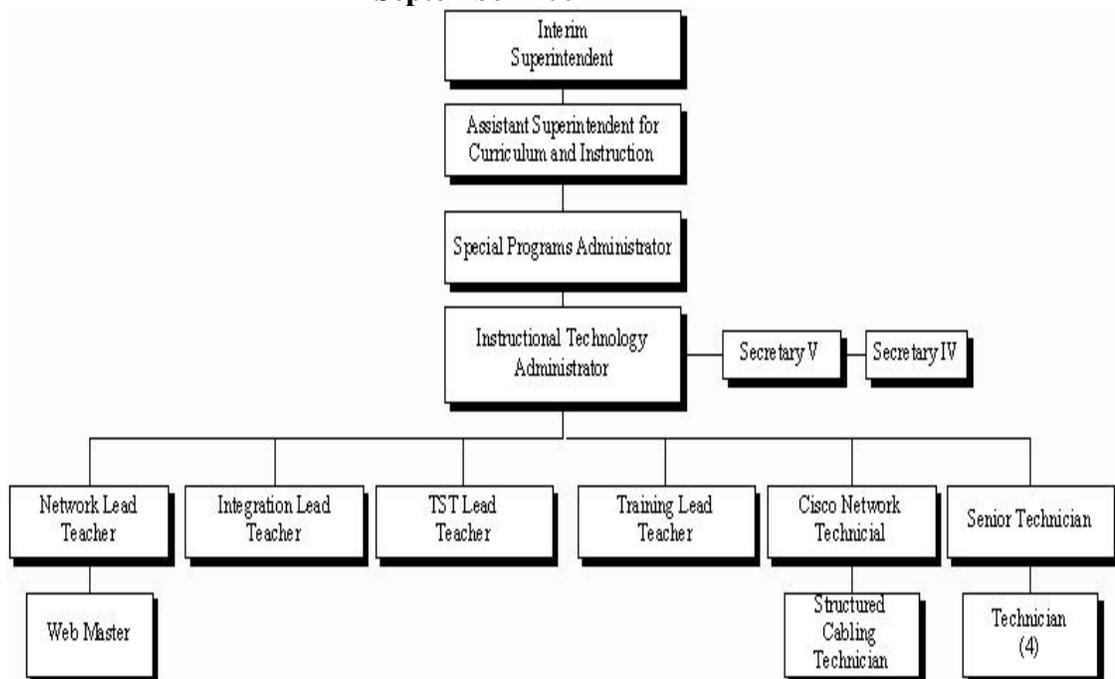
Source: BISD Instructional Technology Department organization chart, September 2002.

The PEIMS Department, has two primary responsibilities, one of which is to ensure the timely and accurate submission of PEIMS data to TEA, and the other is to train the district's PEIMS coordinators and data clerks. The PEIMS administrator reports to the Area 2 superintendent. There are three positions in this department. **Exhibit 9-6** provides the organization chart for the PEIMS Department.

Exhibit 9-6
PEIMS Department
September 2002
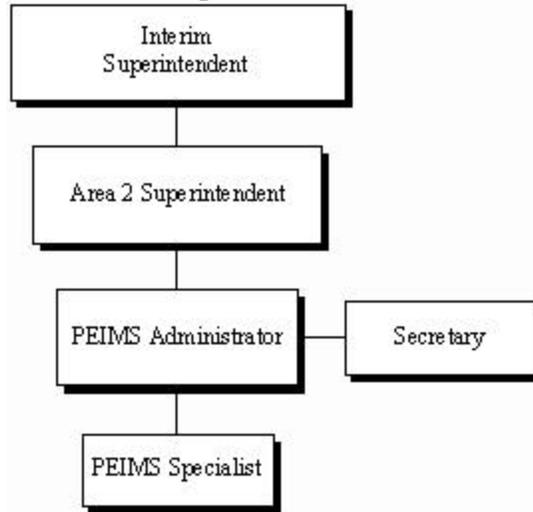
Source: BISD PEIMS Department organization chart, September 2002.

Cumulatively, BISD's technology-related departments have a total of 39 positions. **Exhibit 9-7** shows the breakdown of the staff and compares BISD to the peer districts.

Exhibit 9-7
Technology Staff
BISD vs. Peer Districts
September 2002

District	Technology Staff	Enrollment
Brownsville	**39**	**42,541**
Laredo	67	22,547
Ysleta	40	46,394
Plano	78	47,161
North East	61	50,875

Source: Peer district surveys, BISD organization chart, September 2002.

FINDING

BISD has aggressively pursued grant funding to build its technology infrastructure. The district receives several types of state and federal

grants related to technology, including the Telecommunications Infrastructure Fund (TIF) grant and a federal E-Rate discount. The TIF grant helps schools develop ways to integrate the Internet into school curriculum and instruction. To receive this grant, schools are required to submit an approved technology plan, create a technology task force, provide 10 percent in matching funds, purchase items from the TIF suggested-configuration list, participate in the TIF Tech training program and build a homepage on the Internet. BISD received the majority of its grants from E-Rate funding, which is a federal grant available through the Telecommunications Act of 1996. It offers nonprofit and K-12 schools discounts of 20 to 90 percent on telecommunications services, Internet access and internal connections.

The district has a full-time position that acquires technology grants and helps individual schools

with grant activities. From 1999-2000 to 2001-02, BISD spent more than $13 million in grant funding to build its technology infrastructure and improve the quality of technology equipment in the district. Since 1999, the district also has received significant funding from the Telecommunications Infrastructure Fund (TIF). Grants received by BISD from 1998-99 through 2001-02 are shown in **Exhibit 9-8**.

Exhibit 9-8
Grant Funds Received by BISD
1998-99 through 2001-02

Year	Grant Sources	Amount
1998-99	E-Rate Grant	$3,712,455
1999-2000	E-Rate Grant	$3,279,863
2000-01	E-Rate Grant	$3,209,506
2001-02	E-Rate Grant	1,243,065
Subtotal for E-Rate Grants		**$11,444,889**
1998-99	TIF Grant	$239,160
2000-01	TIF Grant	$299,538
2001-02	TIF Grant	$1,061,673
Subtotal for TIF Grants		**$1,600,371**
Grand Total		**$13,045,260**

Source: BISD Instructional Technology Department, September 2002.

The grants are used to upgrade connectivity and the reliability of the current technology infrastructure.

COMMENDATION

BISD has used TIF and E-Rate money for technology improvements.

FINDING

BISD has an effective strategy to provide front-line diagnostic support at each school.

The district has 51 school-based Technology Support Teachers (TSTs) that are paid a $1,200 stipend per school year from district funds. The TSTs help their schools with technology-support issues. The TSTs' technical skills, however, are not the same as the district's more experienced technical support staff and the TSTs are not responsible for any warranty or hardware repair work.

TSTs serve as technology front-line "troubleshooters" to help resolve minor technology problems and are able to resolve more routine problems without involvement of the ITD and Computer Services technicians. The TST system ultimately results in a savings to the district.

The TSTs familiarity with minor technical problems also enables them to occasionally solve more complex problems with support from ITD and Computer Services staff. The routine and first level technology support provided by the school technologists reduces the number of calls to the Technology Department and provides quicker response time to some technical problems.

COMMENDATION

BISD uses TSTs effectively to provide a basic level of timely and cost-effective technology support at each school.

FINDING

The administrative and instructional technology functions are fragmented.

The district has a weekly superintendents' meeting in which the assistant superintendents, area superintendents and the superintendent discuss district issues. None of the technology administrators attend these meetings. This puts the organization at risk of not understanding the impact of technology-related decisions and missing opportunities to take advantage of emerging technologies. Under the district's organizational

structure, the technology departments do not have the authority and visibility in the organization to play a stronger role in directing the district's technology strategy and functions.

Both the Computer Services and the Instructional Technology departments are located in the middle levels of the BISD organization. The Computer Services Department reports to the Area 3 superintendent and the Instructional Technology Department reports to the Special Programs administrator, who, in turn, reports to the assistant superintendent for Curriculum and Instruction. The PEIMS Department, on the other hand, reports to the Area 2 superintendent. PEIMS reporting requires close and constant involvement with the Computer Services Department because of the required data entry, error correction and reporting elements. Because they report to different area superintendents, the PEIMS Department and the Computer Services Department have problems in workload prioritization and resource.

The organizational structure also limits the amount of time and attention the supervisors spend on technology-related issues. The Area 3 superintendent manages 11 schools and three departments in addition to the Computer Services Department. The Special Programs administrator manages seven different areas including the ITD.

Before November 2001, the Computer Services Department's microcomputer team supported all of the district's administrative and instructional hardware and software. In November 2001, the team was moved from the Computer Services Department to the Instructional Technology Department. The team spent seven months within ITD. In August 2002, half of the team, including its administrator were reassigned to Computer Services. The other half remained under ITD. Currently, BISD technical support is divided into two groups, which results in inefficiencies and workload disparities. The Computer Services Department's microcomputer team's primary role and function is to support the district's and the school's administrative hardware and software, while the ITD technicians support the district's instructional hardware and software.

Exhibit 9-9 provides the number of support staff and the number of computers they support.

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Exhibit 9-9
Number of Support Staff and Number of Computers
September 2002

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Department	Number of Support Staff	Number of Computers	Computer-to-Support

Chapter 9
COMPUTERS AND TECHNOLOGY

B. POLICIES, PROCEDURES AND PLANNING

The Texas Education Code, Section 11.252, 3 (D), requires each school district's improvement plan to include provisions for integrating technology into instructional and administrative programs. Some districts compile these plans with few of the elements required to improve its technology effectively. For example, technology plans normally contain goals and strategies for instructional technology but contain little about the effective use of technology to automate or streamline administrative functions. The best plans contain clear goals, objectives and action plans for technology projects, assign individual responsibility for implementation steps and identify milestone dates for completion.

Planning for the use of new technologies is particularly important for education due to the factors listed below.

- **Student Learning:** To prepare students in the "Information Age," where technological advances occur daily and rapidly and where technology determines the ability to compete with the best.
- **Equity:** The level of technological resources available to each school in a district can vary. Poorly planned introductions of new technology can further increase inequities among and between schools. Careful planning at the district level ensures all schools receive adequate, appropriate and consistent support, and helps guarantee that no student is excluded from the benefits of new technology.
- **Rapid Change:** The pace of technological change will continue toaccelerate. The district must allow for an adequate time period of three to five years to implement new technology.
- **Funding:** Funding can be the greatest barrier to using technology effectively in the classroom. Unless planning and strategic leadership determine whether and how projects will be funded, limited funding will continue to have a greater impact than it should on the quality of public education.
- **Credibility:** A strategic and planned approach to technology theories, acquisitions, use and implementation will translate to professional credibility of the Computer Services Department.

To implement information technology in administrative offices or classrooms, a school district must have the following components: an extensive computer network of modern computers; comprehensive, administrative and instructional software; up-to-date operating systems;

ongoing training; adequate technical support; and a professional staff capable of administering a technology-rich environment. Each of these components should be addressed in a district's technology plan.

FINDING

While the BISD Instructional Technology plan focus on instructional technology is comprehensive, the district's Administrative Technology Plan does not address the administrative technology issues with sufficient detail.

The Administrative Technology Plan has an action item called "maintain replacement schedule for technology." However, the plan does not address what is going to be maintained, when it is going to be maintained and the estimated cost of maintenance. Although the district has created a software committee to find a replacement for the district's current financial and human resources system, the Administrative Technology Plan does not mention any specifics of this major project. The existing Administrative Technology Plan does not address hardware specifics. For example, the hardware for the student-accounting system where all student information is stored, including admission, demographic information, grades and other related information, also lacks speed, memory and storage space, none of which is addressed in the current Administrative Technology Plan.

Exhibit 9-11 shows the district's 2001-03 goals and objectives of the Administrative Technology Plan.

Exhibit 9-11
2001-03 BISD Administrative Technology Plan

Action Plan 1	Minimize physical transportation or printing of information.
Activity 1	Evaluate alternative methods and costs for the displaying or printing of information on each campus and at the central office.
Activity 2	Select the appropriate technology and budget resources for the displaying or printing of data on each campus and at the central office.
Activity 3	Deploy equipment and technology as required in order to diminish the printing of information on each campus and at the central office.
Activity 4	Train the necessary personnel on each campus and at the central office in order to maintain efficient data transmission.
Action Plan 2	Transmit data in a secure manner and effective speed.

Activity 1	Evaluate levels of security and speed that are needed on each campus and at the central office.
Activity 2	Select the appropriate technology and budget resources in order to maintain the transmission of data in a safe and efficient manner at each campus and at the central office.
Activity 3	Install the necessary equipment/technology that will assist in the safe and efficient transmission of data on each campus and at the central office.
Activity 4	Prepare and publish policies detailing the means of ensuring that data is transmitted in a reliable manner for each campus and central office staff.
Activity 5	Train campus and central office staff on the proper way to protect and back up data.
Action Plan 3	**Provide staff with necessary equipment and programs to apply current technology to tasks.**
Activity 1	Survey all schools and central office staff and record the hardware, software and expertise that are currently utilized.
Activity 2	Prepare a document listing standards for individual positions, departments, schools and districtwide infrastructure.
Activity 3	Keep up with the upgrade and replacement of technology and equipment on each campus and at the central office as per the recommended schedules set by the equipment manufacturers and/or technology vendors.
Action Plan 4	**Identify areas for cost savings or improved services.**
Activity 1	Survey schools and departments to determine existing and future uses of technology.
Activity 2	Select the appropriate technology and budget resources to implement the proposed equipment and technology for each campus and central office administrative area.
Activity 3	Install the required equipment, technology and/or procedures necessary to comply with the proposals made by campus and central office staff.
Activity 4	Train the necessary personnel on each campus and at the central office in the use of improved equipment, technology and procedures implemented as a result of responses to the technology survey.
Action Plan 5	**Apply common/homogenous methods and standards**
Activity 1	Inventory all current languages, environments and hardware

	platforms used at each campus and central office administrative area.
Activity 2	Propose standards for network topology and protocols, platforms, hardware, data exchange formats and software as a result of the responses by schools and central office staff to the survey instrument.
Activity 3	Establish procedures for the maintenance and review of proposed networking, hardware and data exchange standards.
Action Plan 6	**Benchmark methods and performance; identify parameters and best practices.**
Activity 1	Survey central office staff at large school districts and record any innovative uses of equipment/technology that is currently being used.
Activity 2	Survey outside consultants and vendors and seek advice on the current technology used by BISD to identify key factors for identifying "best practices".
Activity 3	Compile and summarize responses to surveys and propose the appropriate technology/applications.
Activity 4	Implement a means to measure the methods and performance of each benchmarked parameter.
Action Plan 7	**Maintain replacement schedules for technology.**
Activity 1	Develop replacement schedules for campus and administrative personal computers and peripherals.
Activity 2	Develop replacement schedules for main host systems and peripherals.
Activity 3	Develop replacement schedules for campus and administrative network topology and protocols.
Activity 4	Schedule the appropriate maintenance and training for any updated software.

Source: 2001-03 BISD Administrative Technology Plan, November 2002.

In addition to not having a comprehensive Administrative Technology Plan, existing Administrative and Instructional Technology Plans do not identify sufficient action items or milestones for completion.

The presence of specific action-item outcomes in a technology plan is important because it tells the district whether it is on course, or not, in achieving its planned goals before the plan term expires. Deliverables

allow for a change of course or strategy sooner rather than later. If the district is behind in achieving a specific goal, they should automatically and expeditiously adjust responsibilities and resources to achieve that goal according to schedule. All the timelines in the Instructional Technology Plan are for three years from fall 2001 through spring 2003. According to these timelines, the district will not know the success of its planned goal until the end of the plan period.

Identifying the primary point of responsibility in a technology plan is important because it tells the district who is accountable for each action item. Naming a responsible party also ensures that responsibilities are spread throughout the organization, so that no one has more work than they can handle. The Administrative Technology Plan has 28 action items for which the Computer Services administrator is designated as the responsible person for each. The plan also lacks an estimate of the funding needed to implement each the action item.

In July 2002, BISD's Strategic Planning Committee identified 10 "Criteria for Evaluating Action Plans," including the following considerations which are consistent with the review team's finding that "the district's Administrative Technology Plan does not address the administrative technology issues with sufficient detail." BISD's Strategic Plan Development Manual, *Raising the Standard in Education*, July 23-24, 2002, asks the following questions:

- is the specific objective of each action plan measurable, observable, or demonstrable?
- have the plans included both tangible and intangible benefits?
- have the plans included both tangible and intangible costs?
- have you projected the resources to achieve the specific result?
- have we included every step which will require a significant amount of time, money, effort, or thought?

BISD's Strategic Plan Development Manual also includes a sample "action plan" which includes detailed action steps, assignment dates, start dates, due dates and completion dates. The second page of the sample action plan includes a cost-benefit analysis of tangible and intangible costs as well as narrative descriptives of the same. A comprehensive action plan would, and should, include each of the required factors as presented in its strategic planning manual.

One of BISD's peers, Corpus Christi ISD (CCISD), has a five-year, long-term technology plan. The CCISD plan addresses both administrative and instructional technology issues. It has five main initiatives:

- teaching and learning;

- staff preparation and development;
- business and support; and
- infrastructure for technology.

Within each initiative, the plan has specific goals. One of the business and support initiative's goal is "Provide additional resources for users of financial and student management system." Under this goal the plan has five objectives with cost estimates.

Exhibit 9-12 shows this particular goal and its objectives.

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Exhibit 9-12
Corpus Christi ISD (CCISD) Long-Term Technology Plan
Goal 10 and Objectives

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Goal 10	Objective	Implementation Plan	Cost Estimate
Provide additional resources for users of financial and student management systems.	10.1	Upgrade the Pentamation server.	$320,000
	10.2	Provide graphical user interface for financial and student management systems.	$700,000
	10.3	Integrate student and financial data for data analysis.	$12,000
	10.4	Integrate warranty information into fixed assets database.	$25,000
	10.5	Enhance automated calling system to support district communication.	$50,000

Source: Corpus Christi ISD Five-year Long-Term Technology Plan II, 2001-06.

A technology plan is intended to be the roadmap and planning tool for the Technology Department. Lack of detail regarding timelines, cost and responsible parties for initiatives in the Administrative Technology Plan renders the plan ineffective and can create inefficiencies within the department. For example, a major software implementation initiative with embedded hidden costs can easily go over budget unnoticed. Likewise, such an implementation without a responsible party assigned means that no one can be held accountable for the action item, including whether the

budget is met or not. A plan with sufficient detail to effectively guide a Technology Department includes goals, objectives, specific action items, implementation plans and timelines, and cost estimates. It also identifies responsible parties.

Recommendation 76:

Upgrade the long-range technology plan and broaden its scope to cover all technology areas.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Area 3 superintendent meets with existing district technology committees, the Computer Services administrator, MIS director, business programmers, the microcomputer operator and the system administrator to develop a comprehensive technology objective and plan.	January 2003
2.	The Area 3 superintendent, the information technology management team, the Computer Services administrator, MIS director, business programmers, the microcomputer operator and the system administrator meet with existing technology committees to obtain relevant input.	February 2003
3.	The Area 3 superintendent provides the superintendent with technology areas of short- and long-term need.	March 2003
4.	The superintendent reviews, comments and obtains board approval to clearly define short- and long-term technology needs for the district.	April 2003
5.	The Area 3 superintendent, the board and the superintendent implement, review and consider all district technology needs and requests according to its short- and long-term strategy.	May 2003 and Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The Instructional Technology and the Computer Services Departments do not maintain updated policies and procedures and in some instances, have not actually fully documented their procedures. The Computer Services Department has created a manual called *Purchasing Guidelines for Administrative Desktop Computers.* This manual addresses policies for hardware and software standards, new technology purchasing and service for existing equipment policies, but the manual is dated August 1997 and

has not been updated since then. The recommended computer configuration in the manual is an IBM or Compaq brand 166 MHz-processor-speed computer. But according to the district's Purchasing Web site, the recommended computer configuration is a Dell brand 2.0 GHz. Having two different published recommended computer system specifications causes confusion. The Computer Services Department also has a *Forms, Policies & Documentation Manual* that provides detailed user-information procedures, including middle-school report card procedures and computer installation procedures, which, in some instances, date back to 1998, with no notation of having been reviewed since then to ensure that the procedures actually remain unchanged.

The Instructional Technology Department has a document called "Computing Guidelines for Students" which addresses computer usage and e-mail policy for students. The department also has a "Standard Operating Procedures" document, which is an abbreviated overview of various subjects,including in-district travel, timesheet, overtime and requisitions. Neither document has written procedures for technical-support functions, such as acceptable serviceand/or turnaround response times, defective-part return procedures server back-up and restoring procedures or reallocation of the obsolete equipment procedure. One limited example is the guidance to "check back orders." There is no descriptive narrative on how to check a back order, or where the files might be located, or even what should be "checked."

Another example is the "After First Day of School" protocol which lists a series of tasks and steps that must be followed, including verifying attendance. Neither offers any specific guidance that would serve as a thorough guide in the event of a disaster, for example. The purpose of well-written, comprehensive, and readily accessible policies and procedures manual is to document all business procedures to ensure consistency of practice and continuity of service, as opposed to reliance on any one employee's institutional memory or performance output.

With the exception of the *Forms, Policies & Documentation Manual*, procedures and policy guidelines do not include any degree of detail.

If a school contacts the ITD to dispose of old hardware, the ITD administrator and the support staff determine whether to send the hardware to the Warehouse/Textbooks and Fixed Assets Department for auctioning, or to transfer it to another school that might still have use for it. However, the process of relocating the computers appears limited to the institutional knowledge of long-time employees. Should key, long-time employees leave the district, the knowledge necessary to execute this process will not be available to less experienced employees because that process has not been documented.

Policies and procedures are the foundation of effective technological change. Developing and implementing well-written and organized procedures helps to:

- implement and ensure compliance with policies, as well as document the intent of those policies;
- protect the institutional knowledge of an organization, so that when experienced employees leave, new employees can continue to benefit from the knowledge and experience of former employees;
- provide the basis for training new employees; and
- provide a tool for evaluating employees based on their adherence to procedures.

San Antonio ISD's Technology Department provides the district with clear, informative and user-friendly technology policies to ensure adherence by faculty, staff and students. The scope of the policy documents includes all aspects of the district's hardware and software. The documents are available on the district's Web site, and district staff members are encouraged to contact the department for any clarifications they seek.

Recommendation 77:

Update, create and consolidate policies and procedures for all technology-related functions.

In addition to the written information technology guidelines provided by BISD to the review team, examples of more comprehensive topics are software installation protocols, equipment connections, what needs to be done to replace equipment, virus prevention measures, mandatory backups to prevent the loss of critical data and other critical information for the user community, information technology staff and technicians.

Technology policies and procedures should address topics such as:

- software installation;
- equipment connections;
- equipment replacement;
- use of virus prevention software;
- mandatory backups to prevent the loss of data due to software "bugs", hardware failure, and virus infections;
- off-site storage requirements;
- 3:1 student-to-computer ratio monitoring compliance with the district's acceptable-use policy;
- technical support;
- technology staffing formulas;

- software license requirements and documentation; and
- procedures for gathering user requirements before hardware and software purchases.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Computer Services administrator, MIS director, business programmers, microcomputer coordinator and the Instructional Technology administrator meet with their staff to identify policies and procedures specific to their departments.	March 2003
2.	The Computer Services administrator, MIS director, business programmers, microcomputer coordinator and the Instructional Technology administrator coordinate staff efforts to ensure that all operations, business and administrative procedures specific to each of their departments are properly documented.	March 2003
3.	The Computer Services administrator, the Instructional Technology administrator, MIS director, business programmers and the microcomputer coordinator review the procedures draft with department staff for feedback, changes, and clarification.	May 2003
4.	The Computer Services administrator and the Instructional Technology administrator present documented policies and procedures to the superintendent and Area 3 superintendent for review and approval.	June 2003
5.	The district publishes comprehensive information technology policies and procedures on the BISD Web site.	August 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

BISD has not implemented a structured needs assessment and software selection process that is necessary to plan adequately for the selection and implementation of a new human resources information system, which would integrate finance, payroll, benefits and existing human-resources information systems.

The district has been using an Information Design Inc. (IDI) financial and human-resources system since 1994. This system runs on BISD's Hewlett Packard 3000 mainframe. Although it has PEIMS reporting and online requisition modules, these modules were never implemented or used by the district.

The district needs to obtain a new financial and human-resources system because the mainframe that runs the system is being discontinued by its manufacturer and the system lacks some functionality necessary to run daily processes, which forces several departments to use other applications that are not integrated with the main system.

To obtain a new financial and human-resources system, the district created a software committee. The committee consists of the Computer Services Department administrator, Business and Finance programming staff, two members from the Finance, Payroll and Personnel departments and one member each from the Purchasing, Budget, PEIMS, Fixed Assets and Investments departments. The committee met once in May 2002. Although the committee has plans to meet again, no meeting time has been set. The Computer Services Department staff has seen system demonstrations from IDI and Pentamation system vendors. During the district's 2002-03 budget process, the board approved a survey of department and school needs and a plan for procurement of the new system and hardware. At this time, there is no specific amount budgeted for this project.

The district wants to accomplish the implementation of the new system by December 2003. However, the district does not have a detailed project plan or a road map indicating whether the completion of the system implementation can be achieved by December 2003. The district also does not have the necessary input from user focus groups to determine the technical and functional requirements of the new financial and human-resources system to make an informed purchasing decision.

Schools that effectively implement technology apply standard methodologies to the evaluation, selection and successful implementation of software. These methods include:

- **Process Analysis and Re-engineering** - Process mapping software programs that support the documentation of existing processes and the development of more efficient processes. This exercise also supports the development or revision of operating procedures and job descriptions.
- **Requirements Definition** - Large school districts have unique business requirements that cannot be met by all software. These districts must assign priorities to the different types of requirements to evaluate software options. The requirements definition process also involves all of the key stakeholders in the selection of a new information system, instilling a sense of ownership in the system ultimately selected.
- **Implementation Planning** - Software projects must be carefully planned and integrated with other district planning and budgeting

efforts. This ensures that adequate resources are available to maximize technology.

- **Implementation Project Management** - Software implementation projects must be managed through effective vendor contracts, formal project management responsibilities within the district and a commitment of necessary resources by district management to ensure success.
- **Implementation Change Management** - Converting to new information systems affects staff at all levels, and the level of stress and confusion associated with change must be properly managed through thoughtful and regular communication, as well as adequate end-user training. This ensures end user buy-in, which is critical to any successful implementation.

Successful conversions to new management-information systems require proper planning and implementation, as well as end user buy-in. Without a careful plan for execution and an institutional means by which to garner support for large-scale software changes, the Computer Service Department runs the risk of going over budget, falling short of expectations, overlooking reporting needs, which often drive funding and losing credibility within the district.

Recommendation 78:

Develop and implement a formal methodology for the selection, implementation and integration of an integrated technology information system.

Instituting formal methodologies will ensure the success of a new information-systems implementation.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Area 3 superintendent, Computer Services administrator, MIS Director, Budget director, Human Resources director and the Instructional Technology administrator develop formal methodologies for developing and implementing new systems using industry best practices.	April 2003
2.	The Computer Services administrator implements the newly developed methodologies for new financial and human-resources system project.	June 2003
3.	The superintendent reviews and approves the new methodologies.	July 2003
4.	The original stakeholders, the Computer Services administrator and	Ongoing

	the Instructional Technology administrator jointlyevaluate and update the methodologies as needed.	

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 9
COMPUTERS AND TECHNOLOGY

C. INFRASTRUCTURE, SOFTWARE, HARDWARE AND OPERATIONS

Technology infrastructure consists of cabling, phone lines, hubs, switches, routers and other devices that connect the various parts of an organization through Local Area Networks (LANs) and a Wide Area Network (WAN). A high-speed infrastructure allows users to access people and information inside and outside of the organization.

A WAN generally provides users with tools such as e-mail systems and links to the Internet. WANs are usually "closed," meaning security measures prevent persons outside the WAN from obtaining information housed inside the WAN without proper user identification (ID) and password.

A key function of a WAN is connecting LANs throughout an organization. A LAN connects users within a single building to one network. This is generally accomplished by running wires in ceilings throughout a building. The wires connect individual computers to each other through central computers called file servers. The rooms containing the file servers and termination points for all of the wires are called telecommunication closets. By connecting the LAN to a WAN, all LAN users gain access to others in the organization. An organization that has every user connected must have the infrastructure necessary to take full advantage of both present and future telecommunications capabilities.

While the hardware infrastructure provides the connections that permit communications and the capability to retrieve process and disseminate information, the software makes these tools powerful resources. Software is a critical technology resource that requires close attention to serve an organization effectively. Productivity tools, such as spreadsheets and databases, make it possible for people with limited technical capabilities to perform sophisticated data manipulation that previously could only be performed on a larger mainframe.

Any analysis of a school district's technology should include the type of hardware available to staff, teachers and students. While computers are the predominant hardware resource, other resources include televisions, scanners, digital cameras, color printers, probes and calculators.

Computers used for instruction should have sufficient speed to support recently developed multimedia courseware and should provide access to

the Internet. Computers used for administrative purposes need sufficient memory and speed to use the advanced software tools available for data storage, manipulation and analysis. Administrative computers should be networked. The speed and memory of a computer should be equal to the weight of its role.

BISD has adequate control over its hardware and software. All BISD computers and printers are tagged with barcode stickers. The Warehouse/Textbooks and Fixed Assets Department is responsible for the inventory of all fixed assets including all hardware. In addition to keeping track of all the hardware, the district microcomputer support staff verifies the software licenses before they install any new hardware in the district.

FINDING

The district does not have a disaster recovery plan. If a catastrophic event occurred, such as a hurricane, flood, fire or vandalism, the district's data would be at serious risk of loss. In addition to the data loss, the district will not be able to perform important functions such as payroll, accounts payable or PEIMS reporting on time until the original systems can be restored.

Essential elements of the technology portion of a disaster recovery plan include appointing a disaster recovery team, compiling a list of persons to contact after a disaster, listing critical school functions and essential office equipment and required staffing levels needed immediately after a disaster.

Exhibit 9-13 presents all the key elements of a comprehensive disaster recovery plan.

Exhibit 9-13
Key Elements of a Disaster Recovery Plan

Build the disaster recovery team.	• Identify a disaster recovery team that includes key policy makers, building management, end-users, key outside contractors and technical staff.
Obtain and/or approximate key information.	• Develop an exhaustive list of critical activities performed within the district. • Develop an estimate of the minimum space, equipment and personnel necessary for restoring essential operations. • Develop a time frame for starting initial operations after a security incident.

	• Identify and record the names, contact information and areas of technical expertise of all key personnel and their responsibilities.
Perform and/or delegate key duties.	• Develop an inventory of all computer technology assets, including data, software, hardware, documentation, and supplies. • Set up a reciprocal agreement with comparable organizations to share equipment or lease backup equipment to allow the district to operate critical functions in the event of a disaster. • Make plans to procure hardware, software, and other equipment as necessary to ensure that critical operations are resumed as soon as possible. • Establish procedures for obtaining off-site backup records. • Locate support resources that might be needed, such as equipment repair, trucking, and cleaning companies. • Arrange for priority delivery with vendors for emergency orders. • Identify data recovery specialists and establish emergency agreements.
Specify details within the plan.	• Create and identify a calling or contact tree to ensure proper communications in the event of a disaster. • Identify individual roles and responsibilities by name and job title. • Define actions to be taken in advance of an undesirable event. • Define actions to be taken at the onset of an undesirable event to limit damage, loss, and compromised data integrity. • Identify actions to be taken to restore critical functions. • Define actions to be taken to re-establish normal operations.
Test the plan.	• Test the plan frequently and completely. • Analyze the results to improve the plan and identify further needs.
Deal with damage.	• If a disaster occurs, document all costs and

	• videotape the damage. • Be prepared to overcome downtime on your own as insurance settlements take time to resolve.
Give consideration to other significant issues.	• Do not make a plan unnecessarily complicated. • Make one individual responsible for maintaining the plan, but have it structured so that others are authorized and prepared to implement it if needed. • Update the plan regularly and whenever changes are made to your system and/or to your business operations.

Source: National Center for Education Statistics, "Safeguarding Your Technology" (Modified by TSPR).

The Glen Rose Independent School District (GRISD) has developed a comprehensive disaster recovery plan for handling the loss of its information systems. The GRISD's disaster recovery plan includes emergency contacts for the Technology Department staff, the district and software and hardware vendors. The plan includes protocols for both partial and complete recoveries to ensure that the technology staff is knowledgeable in every aspect of recovery and restoration. The plan outlines designated alternate sites dependent upon the type of outage that occurs. The plan also includes system redundancy and fault protection protocols as well as a tape-backup plan.

Recommendation 79:

Create a districtwide disaster recovery plan.

A comprehensive disaster recovery plan will help the district restart or recover technology operations more quickly should a disaster occur. Obtaining and reviewing disaster recovery plans available from the Regional Education Service Center I (Region 1) and other school districts could speed the planning process.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Computer Services administrator and the Instructional Technology administrator put together a Disaster Recovery Team, composed of department representatives from Finance, Human Resources, Payroll, Purchasing, Student Accounting and Technology.	March 2003

2.	The Disaster Recovery Team develops the disaster recovery plan using the industry best practices and input from peer district's disaster recovery plans.	June 2003
3.	The Computer Services administrator and the Instructional Technology administrator present the plan to the superintendent and school board for approval.	July 2003
4.	The Computer Services administrator and the Instructional Technology administrator communicate the plan to the appropriate personnel.	August 2003
5.	The Disaster Recovery Team tests and updates the plan as necessary.	September 2003 and Annually thereafter

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

Instructional computers are not equitably allocated among BISD's elementary schools, according to the September 2002 actual enrollment numbers and the September 2002 Warehouse/Textbooks and Fixed Assets Department inventory analysis report, the district has 43,673 students and 14,009 instructional computers. Based on these two numbers, the BISD student-to-computer ratio is 3:1. Although this number is in line with the TEA's short-term student-to-computer ratio goal for the Texas school districts, the student-to-computer ratio among the BISD schools range from 2 to 1 in Porter High School, up to 12 to 1 in Paredes Elementary School.

Exhibit 9-14 presents the disparity of student-to-computer ratios among schools. The disparity is less for secondary schools. In elementary schools, on the other hand, it is significant.

Exhibit 9-14
BISD Student-to-Computer Ratios for September 2002

School Type	Student-to-Computer Ratio	Number of Schools	Percent of Schools
Elementary Schools	Less than 3	8	25.0%
	Between 3 and 4	9	28.1%

	Between 4 and 5	7	21.8%
	Between 5 and 6	4	12.5%
	More than 6	4	12.5%
Total		**32**	**100.0%**
Number of elementary schools with ratio higher than 3		**24**	**75.0%**
Middle Schools	Less than 3	5	55.5%
	Between 3 and 4	3	33.3%
	Between 4 and 5	1	11.1%
	Between 5 and 6	0	0%
	More than 6	0	0%
Total		**9**	**100.0%**
Number of middle schools with ratio higher than 3		**4**	**44.4%**
High Schools	Less than 3	5	100.0%
	Between 3and 4	0	0%
	Between 4 and 5	0	0%
	Between 5 and 6	0	0%
	More than 6	0	0%
Total		**5**	**100.0%**
Number of high schools with ratio higher than 3		**0**	**0%**

Source: BISD Instructional Computer Inventory and the BISD actual enrollment number by school, September 2002.
Note: Percentage may not total to 100 percent due to rounding.

The schools are allocated $30 per Average Daily Attendance (ADA) for technology needs. For example, Palm Grove elementary school has 562 students and current student-to-computer ratio is 5 to 1 with 103 instructional computers. According to its enrollment, the Palm Grove Elementary school will receive $16,860 in technology funding from the district. This technology funding is for hardware, software and any technical services it may need. If a school decided to spend its entire budget on hardware, it could purchase 16 computers. (The average price for district-standard computers is around $1,000.) It will take more than

six years to update all the computers in the school. With current enrollment numbers, the school needs 84 instructional computers to achieve a 3 to 1 student-to-computer ratio. With 16 computers per year it will take more than five years to achieve 3 to 1 student-to-computer ratio. Most computers the district currently has will be obsolete or non-operational within five years.

Aside from grant funding, the technology budget is the only source of revenue for schools to obtain hardware, software and technical consulting services. This practice creates technology disparity among schools with low enrollment numbers and schools with high enrollment numbers. Secondary schools, in addition to their technology budgets, receive funds for Career and Technology and special programs that they use to obtain more technology for their schools. This is not the case for elementary schools because they do not have Career and Technology or any other special programs that could provide additional funding over and above what is received by the federal and state funding based on enrollment.

Making technology a viable instructional tool requires schools to have a sufficient number of computers so that all students can have full and easy access to a computer. The TEA created a *Long-Range Plan for Technology 1996-2010*, which set short-term, mid-term and long-term goals for the number of computers for each student in Texas classrooms.

Recommendation 80:

Equitably distribute instructional computers among elementary schools.

The district should use the TEA Long-Range Plan student-to-computer ratio targets for each school. Weight factors can be assigned to allow for special needs or programs, but the resulting ratio for the district should remain near the target. Existing computers may need to be reallocated to other schools to achieve equity. If computers were obtained with grant funds, the district must ensure grant requirements are not violated before computers are reassigned. The district should use its projected purchases of computers and workstations to reduce the variances in the student-to-computer ratios among schools in 2002-03.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Instructional Technology administrator develops a three-year computer allocation plan to achieve the targeted student-to-computer ratio based on existing computers and planned purchases.	March 2003

2.	The superintendent approves the computer allocation plan.	May 2003
3.	The Instructional Technology administrator executes the computer allocation plan over a three-year period.	July 2003 to July 2006

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The district does not have enough staff to provide technology training for its teachers. The district's Instructional Technology Plan says, "Our number one priority is staff development. To be effective, this plan requires that teachers and administrators be skilled at all levels. The district will support a needs based training program designed to help educators remain current with advances in technology." One of the plan's activities is for basic computer-applications training. In that activity the plan has an evaluation measure that calls for up to four days of training for 2002. The plan also asks for the increase in staff for the technology training in order to achieve its staff development goals. Due to the budget constraints, the district provides only two days of training.

The Instructional Technology Department has one Training Lead Teacher (TLT) to provide technology training for the district. The TLT develops basic training materials for the software applications that are most commonly used by teachers, including Microsoft Word, Excel, PowerPoint, and Gradebook. The TLT provides two days of technology training for each school. The district requires six hours of Continuing Professional Education (CPE) for teachers in the area of technology. By attending these training days, each teacher gets one-and-a-half hours credit toward their required six hours. There are 51 schools in the district. It takes the TLT eight months, September through April, to complete this training schedule.

In addition to this training, Region 1 provides technology training to BISD teachers as part of the TIF grant programs. The school administrators also use their school TSTs to provide additional technology training for their teachers. TSTs primarily serve as technology front-line "troubleshooters," helping to resolve minor technology problems and do not have as much technology training or experience as the TLT. Any training provided by the TSTs is more basic than if provided by the TLT given the level of TST technical expertise required to perform their respective roles.

Exhibit 9-15 compares BISD to its peers in the number of hours of technology training each district requires, whether the training is mandatory or not, and the number of training staff each district has. Compared to its peer districts, BISD has both the least training hours and the least number of training staff.

Exhibit 9-15
Technology Training
BISD vs. Peer Districts
September 2002

District	Total Technology Training for Teachers	Mandatory	Technology Training Staff
Brownsville	**6 Hours**	**No**	**1**
Laredo	12 Hours	Yes	3
Ysleta	12 Hours	No	3
Plano	30 Hours	No	12
North East	9 Hours	Yes	16

Source: Peer district surveys and BISD Organization chart, Instructional Technology Plan, September 2002.

Recommendation 81:

Hire a Training Lead Teacher to conduct technology training for schools.

With an additional Training Lead Teacher, the district will provide additional quality technology training to its schools.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Instructional Technology administrator presents the request for an additional TLT to the superintendent.	March 2003
2.	The superintendent reviews and submits the request to the school board for approval.	April 2003
3.	The area superintendent for Human Resources posts the job opening on the district's Web site and in the local newspaper.	May 2003

4.	The Instructional Technology administrator interviews and hires a TLT.	June 2003
5.	The Instructional Technology administrator assigns TLTs to schools based on enrollment and training.	September 2003

FISCAL IMPACT

The average annual salary for a TLT in BISD is $46,923.The fiscal impact is based on the average salary for a TLT, averaging $46,923 plus benefits ([$46,923 x 1.12] + $3,483) equaling for $56,037.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Hire a Training Lead Teacher to conduct technology training for schools	($56,037)	($56,037)	($56,037)	($56,037)	($56,037)

Chapter 10
STUDENT TRANSPORTATION

This chapter reviews the Brownsville Independent School District's (BISD) student transportation function in the following sections:

A. Organization and Staffing
B. Routing and Scheduling
C. Management Practices
D. Safety and Training
E. School Bus Vehicle Maintenance

The primary goal of every school district transportation department is to transport students to and from school and approved extracurricular functions in a timely, safe and efficient manner.

BACKGROUND

The Texas Education Code authorizes, but does not require, Texas school districts to provide transportation for students in the general population between home and school, from school to career and technology training locations and for extracurricular activities. The federal Individuals with Disabilities Education Act (IDEA) requires a school district to provide transportation for students with disabilities if the district also provides transportation for students in the general population, or if students with disabilities require transportation to receive special education services.

Texas school districts are eligible for reimbursement from the state for transporting regular program, special program and career and technology education (CATE) program students. The Texas Legislature sets funding rules and the Texas Education Agency (TEA) administers the program. TEA requires each school district eligible to receive state reimbursement to provide two annual school transportation reports, the Route Services Report and the Operations Report. The Route Services Report documents reimbursable miles traveled and number of riders by program and subprogram. The Operations Report assigns all costs and miles to either regular or special programs.

State funding for regular program transportation is limited to transportation for students living two or more miles from the school they attend. The state does not reimburse districts for transporting students living within two miles of the school they attend unless they face hazardous walking conditions on the way to school, such as the need to cross a four-lane roadway without a traffic signal or crossing guard. The state will reimburse districts for transporting students on hazardous routes

within two miles of school; however, the reimbursement for transporting students on hazardous routes may not exceed 10 percent of the total annual reimbursement for transporting only two-or-more-mile students. A school district must use local funds to pay for transportation costs the state reimbursement does not cover.

For the regular program, the state reimburses districts for qualifying transportation expenses based on linear density, which is the ratio of the average number of regular program students transported daily on standard routes to the number of route miles traveled daily for those standard routes. Standard miles and riders do not include miles or riders for alternative, bilingual, desegregation, magnet, parenting, pre-kindergarten regular transportation or hazardous area service. TEA uses this ratio to assign each school district to one of seven linear density groups. Each group is eligible to receive a maximum per mile allotment. Allotment rates are based on the previous year's linear density.

Exhibit 10-1 shows the linear density groups and the related allotment per mile.

Exhibit 10-1
Linear Density Groups

Linear Density Group	Allotment Per Mile
2.40 and above	$1.43
1.65 to 2.40	$1.25
1.15 to 1.65	$1.11
0.90 to 1.15	$0.97
0.65 to 0.90	$0.88
0.40 to 0.65	$0.79
Up to 0.40	$0.68

Source: Texas Education Agency (TEA), Handbook on School Transportation Allotments, revised May 2001.

BISDqualified for the highest allotment rate each year from 1998-99 through 2000-01. **Exhibit 10-2** shows the linear densities for 2000-01, and the resulting allotment for 2001-02, for BISD and a peer group of school districts. The BISD student transportation function is large as compared to most of the peer districts.

Exhibit 10-2
BISD and Peer Districts
Linear Density 2000-01 and Allotment per Mile 2000-01 and 2001-02

District	Standard Regular Riders*	Standard Regular Miles	Linear Density 2000-01	Allotment Per Mile 2001-02	Allotment Per Mile 2000-01**
Brownsville	**1,902,060**	**795,834**	**2.390**	**$1.25**	**$1.43**
Corpus Christi	365,760	219,228	1.668	$1.25	N/A
Laredo	98,100	33,840	2.899	$1.43	N/A
North East	1,969,740	1,185,192	1.662	$1.25	N/A
Plano	830,340	572,541	1.450	$1.11	N/A
Ysleta	503,460	190,476	2.643	$1.43	N/A
Peer Average	**753,480**	**440,255**	**1.711**	**$1.25**	**N/A**

Source: TEA, School Transportation Route Services Reports, 1999-2000 and 2000-01.
*Annual riders calculated by multiplying average daily riders by 180 school days.
**Allotment per mile 2000-01 is based on linear density for 1999-2000.

BISD received the maximum allotment in 2000-01 based on the linear density for 1999-2000. Standard regular miles of 785,149 and 1,912,860 riders during 1999-2000 resulted in a linear density of 2.436 (1,912,860/785,149). Therefore, the district's reimbursement rate for each eligible regular program route mile for 2000-01 is $1.43. Eligible route miles are measured beginning and ending at the last school served for home-to-school route service or first school served for school-to-home route service. Route miles eligible for reimbursement do not include extracurricular miles, deadhead miles, hazardous route miles in excess of the 10 percent limit or other miles reported to TEA.

The BISD total annual operations cost in 2000-01 was $2.54 for each odometer mile. Odometer miles are all miles driven, including miles for extracurricular trips, maintenance and deadhead. Deadhead miles occur between the locations where the student transportation vehicle is parked during the day or night and the school where the eligible route miles begin and end.

Reimbursement for special program transportation is not based on linear density. The per mile allotment rate for a special program is set by the Texas Legislature. All transportation for special program students, except

certain extracurricular trips, is eligible for state reimbursement at $1.08 each route mile. In 2000-01, BISD's actual cost for special program transportation was $2.46 per odometer mile.

The reimbursement per mile for the CATE program is based on the cost for regular program miles for the previous fiscal year as reported by the district in the TEA Operations Report. In 2000-01, TEA allocated $2.79 to BISD for each reimbursable CATE mile.

Under TEA guidelines, a school district may provide a private program, which reimburses eligible students for transportation provided by a parent or public transit. To be eligible, students must live in geographically isolated areas two or more miles from their home school and from the nearest available school bus route. The TEA Handbook on School Transportation Allotments says that determination should be made on a case-by-case basis and only approved in extreme hardship cases. TEA reimburses private transportation at a rate of 25 cents per mile, up to a maximum of $816 per student.

In 2000-01, BISD operated 1,071,054 reimbursable regular program miles, 673,656 reimbursable special program miles, 47,911 reimbursable CATE miles and no private program reimbursable miles. **Exhibit 10-3** shows a comparison of reimbursable route miles for BISD and the peer districts.

Exhibit 10-3
BISD and Peer Districts Reimbursable Route Miles by Category
2000-01

District	Regular Reimbursable Miles	Special Reimbursable Miles	CATE Reimbursable Miles	Private Program Reimbursable Miles
Brownsville	**1,071,054**	**673,656**	**47,911**	*
Corpus Christi	712,374	870,332	60,326	*
Laredo	67,851	156,272	5,247	*
North East	1,608,652	1,517,357	*	*
Plano	808,733	618,402	*	*
Ysleta	382,446	754,323	69,750	890
Peer Average	**716,011**	**783,337**	**45,108**	**890**

TEA reimbursable miles for regular program students include transportation for programs such as alternative schools, parenting programs and pre-kindergarten classes. Miles for routes that serve these programs are reimbursed at the regular program rate determined by the linear density group for standard miles. These programs and the reported miles for BISD and peer districts are shown in **Exhibit 10-4**.

Exhibit 10-4
BISD and Peer Districts Regular Program Reimbursable Miles by Program
2000-01

District	Standard	Alternative	Bilingual	Desegregation	Gifted	Parenting	Pre-K/K	Total Regular Reimbursable Miles
Brownsville	**939,672**	**38,340**	*	*	*	**36,360**	**56,682**	**1,071,054**
Corpus Christi	273,732	63,468	18,648	29,556	257,400	15,948	53,622	712,374
Laredo	54,432	*	*	*	*	13,419	*	67,851
North East	1,364,940	36,576	118,008	*	5,032	*	84,096	1,608,652
Plano	682,319	*	77,580	*	*	*	48,834	808,733
Ysleta	228,042	26,640	30,780	*	24,012	*	72,972	382,446
Peer Average	**520,693**	**42,228**	**61,254**	**29,556**	**95,481**	**14,684**	**64,881**	**716,011**

In 2000-01 BISD operated 1,071,054 regular program route miles of which 156,600 were hazardous routes. Hazardous miles are 17.1 percent of regular two-or-more-mile route miles [156,600 / (1,071,054 - 156,600) = 17.1 percent]. Since the state does not reimburse districts for transporting students on hazardous routes exceeding 10 percent of the total annual reimbursement for transporting two-or-more-mile students, BISD was eligible to receive state funding for 914,454 (1,071,054 - 156,600) regular route miles and 91,445 (914,454 x 10 percent) hazardous miles.

BISD was reimbursed for a total of 1,005,899 regular program route miles at $1.43 per mile for a reimbursement of $1,438,436. In addition, BISD received funding for 20,757 CATE regular program miles at $2.79 per mile (20,757 x $2.79 = $57,912). The total state reimbursement for the regular program was $1,496,348 ($1,438,436 + $57,912).

BISD also received reimbursement for 673,656 special program miles at $1.08 per mile (673,656 x $1.08 = $727,548) and 27,154 CATE miles for special program at $2.79 per mile (27,154 x $2.79 = $75,760). The total reimbursement for special program was $803,308.

Exhibit 10-5 compares total annual operations cost and the state allotment for regular program and special program transportation in 2000-01 for BISD and the peer districts as reported by TEA. The operations cost and state allotment for the regular program includes regular program CATE route miles and private program miles. The operations cost and state allotment for the special program includes special program CATE route miles and private program miles.

Exhibit 10-5
BISD and Peer Districts State Allotment Regular and Special
Programs
2000-01

District	Regular Program*			Special Program*		
	Operations Cost**	State Allotment	Percent State	Operations Cost**	State Allotment	Percent State
Brownsville	**$4,916,468**	**$1,496,348**	**30%**	**$2,647,329**	**$803,308**	**30%**
Corpus Christi	$2,892,139	$903,315	31%	$2,566,014	$1,077,926	42%
Laredo	$1,062,632	$91,181	9%	$906,525	$168,774	19%
North East	$7,689,168	$1,744,692	23%	$1,990,354	$1,638,746	82%
Plano	$4,152,661	$826,369	20%	$1,351,587	$667,874	49%
Ysleta	$2,587,269	$655,993	25%	$3,065,601	$895,997	29%
Peer Average	**$3,676,774**	**$844,310**	**23%**	**$1,976,016**	**$889,863**	**45%**

Source: TEA, School Transportation Operations Report and School Transportation Route Services Reports, 2000-01.

Exhibit 10-6 compares the transportation cost of the peer districts with BISD as a percent of total district expenses. In 2000-01, BISD expended 2.7 percent of total district operating expenses on the transportation function.

Exhibit 10-6
BISD and Peer Districts Cost as a Percent of Total Actual Operating Expenses
2000-01

District	Total District Operating Expenses*	Transportation Operating Cost*	Percent of Total Expenses
Brownsville	**$277,862,724**	**$7,563,797**	**2.7%**
Corpus Christi	$245,674,529	$5,458,153	2.2%
Laredo	$141,660,361	$1,969,157	1.4%
North East	$335,414,434	$9,679,522	2.9%
Plano	$397,498,866	$5,504,248	1.4%
Ysleta	$292,023,150	$5,652,870	1.9%
Peer Average	**$282,454,268**	**$5,652,790**	**2.0%**

Source: TEA, Public Education Information Management System (PEIMS), 2000-01; TEA, School Transportation Operations Report, 2000-01.
*Operating expense excludes capital outlay and debt service.

The district commits a higher percent of funds to the transportation function compared to the peer average. In addition, BISD transports 40 percent of students enrolled in the district, the highest percent of the peer group. **Exhibit 10-7** shows the percent of students transported compared to total enrollment at BISD and the peer districts.

Exhibit 10-7
BISD and Peer Districts Percent of Enrolled Students Riding the Bus
2000-01

District	Enrollment	Average Daily Riders	Percent of Enrolled Students

			Riding the Bus
Brownsville	**40,898**	**16,387**	**40%**
Corpus Christi	39,138	5,586	14%
Laredo	22,547	1,918	9%
North East	50,875	17,380	34%
Plano	47,161	5,757	12%
Ysleta	46,394	5,791	12%
Peer Average	**41,223**	**7,286**	**18%**

Source: TEA, Academic Excellence Indicator System (AEIS), 2000-01. Riders from TEA, School Transportation Route Services Reports, 2000-01.

Exhibit 10-8 documents a five-year history of the total miles of transportation service provided by BISD by category of service. Route miles occur while a bus is on a defined route transporting students. These miles are reported on the TEA Operations Report and reflect actual route miles operated (with deadhead). Extracurricular miles include student transportation for field trips and extracurricular activities such as athletics, band and University Interscholastic League (UIL) events. Other miles consist of all miles other than route miles, mileage to and from routes and extracurricular miles.

Exhibit 10-8
BISD Annual Miles of Service
1996-97 through 2000-01

	1996-97	**1997-98**	**1998-99**	**1999-2000**	**2000-01**	**Percent Change 1996-2001**
Regular Program						
Route Miles (with deadhead)	1,518,851	2,000,696	1,510,922	1,567,237	1,572,100	4%
Extracurricular Miles for Regular Program*	458,753	433,710	463,431	493,245	355,244	(23%)

Other Miles	6,277	6,858	9,437	10,759	6,825	9%
Annual Regular Miles	**1,983,881**	**2,441,264**	**1,983,790**	**2,071,241**	**1,934,169**	**(3%)**
Special Program						
Route Miles (with deadhead)	1,165,917	1,157,375	1,236,651	1,185,271	727,510	(38%)
Extracurricular Miles for Special Program, Actual	5,214	7,778	7,381	7,126	8,718	67%
Extracurricular Miles for Regular Program*	N/A	N/A	N/A	N/A	337,676	N/A
Total Extracurricular Miles for Special Program as Reported to TEA	**5,214**	**7,778**	**7,381**	**7,126**	**346,394**	**N/A**
Other Miles	1,864	2,050	3,761	5,793	3,675	97%
Annual Special Miles	**1,172,995**	**1,167,203**	**1,247,793**	**1,198,190**	**1,077,579**	**(8%)**
Route Miles (with deadhead)	2,684,768	3,158,071	2,747,573	2,752,508	2,299,610	(14%)
Extracurricular Miles for Regular Program*	458,753	433,710	463,431	493,245	692,920	51%
Extracurricular Miles for Special Program	5,214	7,778	7,381	7,126	8,718	67%
Other Miles	8,141	8,908	13,198	16,552	10,500	29%
Total Odometer Miles	**3,156,876**	**3,608,467**	**3,231,583**	**3,269,431**	**3,011,748**	**(5%)**

BISD regular program route miles increased 4 percent from 1,518,851 miles in 1996-97 to 1,572,100 miles in 2000-01. Special program route miles decreased 38 percent from 1,185,271 miles in 1999-2000 to 727,510 miles in 2000-01. Over all, total route miles decreased 14 percent from 1996-97 to 2000-01.

Reported special program extracurricular miles increased from 7,126 miles in 1999-2000 to 346,394 miles in 2000-01, a 486 percent increase. When the review team questioned the district about the 486 percent increase, the district researched the data and discovered that extracurricular miles were reported incorrectly to TEA. BISD reported 337,676 of the district's regular program extracurricular miles as special program extracurricular miles in the TEA School Transportation Operations Report, Actual extracurricular miles were 8,718 for special program and 692,920 for the regular program.

The misclassification of extracurricular miles in 2000-01 was caused by the type of bus used for extracurricular trips. The district misinterpreted TEA instructions on the School Transportation Operations Report for allocating miles by type of program rather than type of bus.

BISD regularly assigns school buses to extracurricular trips according to seating capacity. Small buses (special program buses) are assigned to extracurricular trips for a relatively small number of regular program students. In 2000-01, BISD reported these extracurricular miles under the category of special program transportation because the bus is categorized as a special program bus. BISD also allocated related costs for the extracurricular trips to special program transportation. The district is correcting the TEA reports to reflect extracurricular miles by program for 2000-01.

After the correction in reporting miles in 2000-01, BISD regular program extracurricular miles increased 51 percent between 1996-97 and 2000-01, and special program extracurricular miles increased 67 percent. Total other miles increased 29 percent. Total odometer miles decreased 5 percent in the four-year period.

Exhibit 10-9 compares the total and extracurricular transportation miles of peer districts with BISD. BISD operates a higher percent of extracurricular miles compared to all peers except Laredo. BISD and Laredo transport students for longer distances within the district and region for athletics, band and UIL events.

Exhibit 10-9
BISD and Peer Districts Extracurricular Miles
2000-01

District	Total Odometer Miles	Total Extracurricular	Percent Extracurricular
Brownsville	**3,011,748**	**701,638**	**23%**
Corpus Christi	2,067,826	218,445	11%
Laredo	568,183	153,396	27%
North East SA	4,231,719	306,850	7%
Plano	2,166,675	132,897	6%
Ysleta	1,710,465	331,526	19%
Peer Average	**2,148,974**	**228,623**	**11%**

Source: TEA, School Transportation Operations Report, 2000-01.

A five-year history of BISD operations cost, annual odometer miles and transportation cost per mile, provided by TEA, is shown in **Exhibit 10-10**. Cost per mile is determined by dividing total annual operations cost less debt service and capital outlay by total annual odometer miles. The number of miles used to calculate the cost per mile is taken from the TEA Operations Report data for odometer miles operated. These miles include deadhead and maintenance miles and other sources of added miles.

Exhibit 10-10
BISD Regular and Special Program Transportation Historical Data
1996-97 through 2000-01

	1996-97	1997-98	1998-99	1999-2000	2000-01	Percent Increase/ (Decrease) 1996-97 through 2000-01
Operations Cost*						
Regular Program	$3,272,051	$4,248,563	$3,785,821	$4,292,743	$4,916,468	50%
Percent Change		30%	(11%)	13%	15%	

Special Program	$1,934,903	$2,031,649	$2,039,134	$2,311,477	$2,647,329	37%
Percent Change		5%	1%	13%	15%	
Total	**$5,206,954**	**$6,280,212**	**$5,824,955**	**$6,604,220**	**$7,563,797**	**45%**
Annual Odometer Miles						
Regular Program	1,983,881	2,441,264	1,983,790	2,071,241	1,934,169	(3%)
Percent Change		23%	(19%)	4%	(7%)	
Special Program	1,172,995	1,167,203	1,247,793	1,198,190	1,077,579	(8%)
Percent Change		(1%)	7%	(4%)	(10%)	
Total	**3,156,876**	**3,608,467**	**3,231,583**	**3,269,431**	**3,011,748**	**(5%)**
Cost per Mile						
Regular Program	$1.65	$1.74	$1.91	$2.07	$2.54	54%
Percent Change		6%	10%	9%	23%	
Special Program	$1.65	$1.74	$1.63	$1.93	$2.46	49%
Percent Change		6%	(6%)	18%	27%	

Source: TEA, School Transportation Operations Report, TEA, School Transportation Route Services Report, 1996-97 through 2000-01.
* Operations cost exclude capital outlay and debt service.

The figures in **Exhibit 10-10** indicate the district's operation costs are increasing while miles are decreasing during the time period. Operations cost for regular program transportation from 1996-97 to 2000-01 increased 50 percent, odometer miles decreased 3 percent and regular program cost per odometer mile increased 54 percent. In addition, between 1996-97 and 2000-01, operations cost for special education transportation increased 37 percent, odometer miles decreased 8 percent and special program cost per odometer mile increased 49 percent. However, as presented in **Exhibit 10-**

11, BISD's cost for regular program transportation in 2000-01 of $2.54 per mile is the lowest of the BISD peer group. The regular program cost per odometer mile is 12 percent lower than the peer average in 2000-01. In addition, the cost for special program transportation in 2000-01 of $2.46 per mile is 8 percent lower than the peer average.

Exhibit 10-11 compares transportation cost efficiency for 2000-01 for BISD and the peer districts based on TEA data. Cost per mile is determined by dividing total annual operations cost less debt service and capital outlay by total annual odometer miles.

Exhibit 10-11
BISD and Peer Districts Cost per Mile
2000-01

| | Cost per Mile | |
District	Regular Program	Special Program
Brownsville	**$2.54**	**$2.46**
Corpus Christi	$2.64	$2.64
Laredo	$3.26	$3.75
North East SA	$2.87	$1.28
Plano	$2.65	$2.26
Ysleta	$3.11	$3.49
Peer Average	**$2.90**	**$2.68**
BISD Percent Different than Peer Average	**(12%)**	**(8%)**

Source: TEA, School Transportation Operations Report and School Transportation Route Services Report, 2000-01.

Although operations costs increased 45 percent during the five-year period as displayed in **Exhibit 10-10**, BISD's cost per mile for both programs is below the peer average. The increase in total operations cost is largely due to an increase in the hourly rates of drivers and monitors during 2000-01. In addition, the district implemented a minimum hourly rate scale for drivers by years of experience. BISD also incurred increasing overtime expenditures during the period due to a driver shortage and driver absences occurring without a substitute pool of drivers.

The district said that other variables contributing to the increasing operations costs from 1996-97 to 2000-01 include a 50 percent increase in the price of fuel during 1999-2000 and multiple software purchases. As presented in **Exhibit 10-12**, supplies and materials increased 75 percent in 1999-2000 when software for the time clock system and automated route scheduling was purchased. **Exhibit 10-12** summarizes BISD transportation operations cost for each of five years by object of expenditure as defined by TEA in the instructions for the annual TEA Route Services Report.

Exhibit 10-12
BISD Transportation Operations Cost by Type of Expenditure
1996-97 through 2000-01

Object	1996-97	1997-98	1998-99	1999-2000	2000-01	Percent of Total 2000-01	Percent Increase/ (Decrease) 1996-97 through 2000-01
Salaries and Benefits	$4,432,073	$5,272,738	$4,941,521	$5,224,850	$6,247,255	83%	41%
Percent Change		19%	(6%)	6%	20%		
Purchased Services	$109,500	$82,815	$162,648	$186,118	$175,863	2%	61%
Percent Change		(24%)	96%	14%	(6%)		
Supplies and Materials	$625,722	$823,834	$612,168	$1,068,300	$997,505	13%	59%
Percent Change		32%	(26%)	75%	(7%)		
Other Expenses	$39,659	$100,825	$108,618	$124,952	$143,174	2%	261%
Percent Change		154%	8%	15%	15%		
Total Cost	**$5,206,954**	**$6,280,212**	**$5,824,955**	**$6,604,220**	**$7,563,797**		**45%**

During the time period presented in **Exhibit 10-12**, BISD revised several methods for allocating costs to object categories. In 1998-99, BISD allocated utilities costs to purchased services resulting in an increase of 96 percent from the previous year. Previously, these costs were included in the district's general operating fund and not allocated to the Transportation Department. In 1997-98, other expenses increased 154 percent when the district began to include employee insurance and benefits in this object description. The reallocation contributes to a 261 increase during the five-year period. Previously, employee insurance was included in the district's general operating fund.

Exhibit 10-13 shows the annual riders, total annual route miles and total buses for BISD compared to peer districts for 2000-01. Total annual riders are determined by multiplying average daily riders by 180 school days. Annual riders include CATE riders. Route miles occur while a bus is on a defined route transporting students. These miles are reported on the TEA Operations Report and reflect actual route miles operated (with deadhead). The number of buses by program is reported on the TEA Operations Report.

Exhibit 10-13
BISD and Peer Districts Operating Statistics
2000-01

District	Regular Program			Special Program		
	Annual Riders*	Total Route Miles	Total Buses	Annual Riders*	Total Route Miles	Total Buses
Brownsville	**2,780,460**	**1,572,100**	**161**	**169,200**	**727,510**	**102**
CorpusChristi	748,800	872,500	109	256,680	958,866	81
Laredo	253,080	131,035	30	92,160	185,404	27
North East	2,890,800	2,359,551	265	237,600	1,524,905	91
Plano	909,180	1,420,787	150	127,080	595,991	63
Ysleta	842,220	482,002	86	200,160	862,711	104
Peer Average	**1,128,816**	**1,053,175**	**128**	**182,736**	**825,575**	**73**

Exhibit 10-14 compares service effectiveness or productivity and cost-effectiveness indicators for BISD and peer districts based on TEA data. The rider per route mile is determined by dividing total annual riders by total annual route miles including deadhead. Total annual riders are determined by multiplying average daily riders by 180 school days. The riders per bus are determined by dividing average daily riders by the total number of buses. The route cost per rider is determined by multiplying route miles by cost per mile and then dividing by annual riders.

Exhibit 10-14
BISD and Peer Districts Service Effectiveness and Cost Effectiveness Indicators
2000-01

District	Regular			Special		
	Riders/ Route Mile	Riders/Bus	Route Cost/ Rider	Riders/Route Mile	Riders/Bus	Route Cost/ Rider
Brownsville	**1.77**	**96**	**$1.44**	**0.23**	**9**	**$10.56**
Corpus Christi	0.86	38	$3.07	0.27	18	$9.87
Laredo	1.93	47	$1.69	0.50	19	$7.54
North East	1.23	61	$2.34	0.16	15	$8.25
Plano	0.64	34	$4.14	0.21	11	$10.59
Ysleta	1.75	54	$1.78	0.23	11	$15.04
Peer Average	1.28	47	$2.60	0.27	15	$10.26
BISD Percent Different than the Peer Average	38%	104%	(45%)	(15%)	(40%)	3%
Peer Average without	N/A	N/A	N/A	N/A	N/A	**$9.06**

Ysleta							
BISD Percent Different than the Peer Average without Ysleta	N/A		N/A	N/A	N/A		N/A	17%

The regular program productivity statistics were higher than the peer average in 2000-01. BISD riders per route mile (1.77 riders) were 38 percent higher than the peer average and riders per bus (96 riders) were 104 percent higher than the peer average. Cost-effectiveness indicators for the BISD's regular program also compared favorably to the peer districts. The regular program route cost per rider of $1.44 was 45 percent lower than the peer average.

Special program productivity was lower than the peer average in 2000-01. Riders per route mile measured 15 percent lower and riders per bus measured 40 percent lower than peers. However, the district's special program cost per odometer mile is 8 percent lower than the peer average.

The special program cost per rider of $10.56 is only 3 percent higher than the peer average of $10.26 in 2000-01. However, the peer average of cost per rider is overstated for comparison purposes since Ysleta ISD's (YISD) cost per rider of $15.04 is 42 percent higher than the second highest peer's (Plano ISD) cost per rider figure ($10.59). Therefore, if YISD is not included in the peer group, the peer average cost per rider is $9.06. In this case, BISD's cost per rider of $10.26 is 17 percent higher than the peer average. The district said that cost per special education rider is comparably high due to efforts implemented for better service to special education students. Efforts include a decrease in the number of special education students on each route in order to limit a student's bus ride to one hour. The district also began to limit the number of wheelchair students on a bus to three or less for the purpose of increasing safety during an evacuation scenario.

Since 1990, BISD's Transportation Department administration has changed five times including an outsourcing contract through a private transportation company. BISD contracted with Durham Transportation Inc. during 1992. The district cancelled the contract and returned to public operation after nine months with Durham. Frequent management turnover

caused numerous revisions of departmental policies and procedures. The Transportation Department has experienced many changes in organizational structure since 1990.

Under its current leadership, however, BISD's Transportation Department has overcome many of the problems it faced in the past. In fact, BISD's transportation operations were recognized nationally by *School Bus Fleet* magazine in October 2002. The publication honored BISD's Transportation Department among the "Great Fleets Across America." *School Bus Fleet* awards the title to one district for each state, and BISD was chosen for the state of Texas.

The department's organization structure for 2002-03 is presented in **Exhibit 10-15**.

Exhibit 10-15
BISD Transportation Department Organization Chart
2002-03
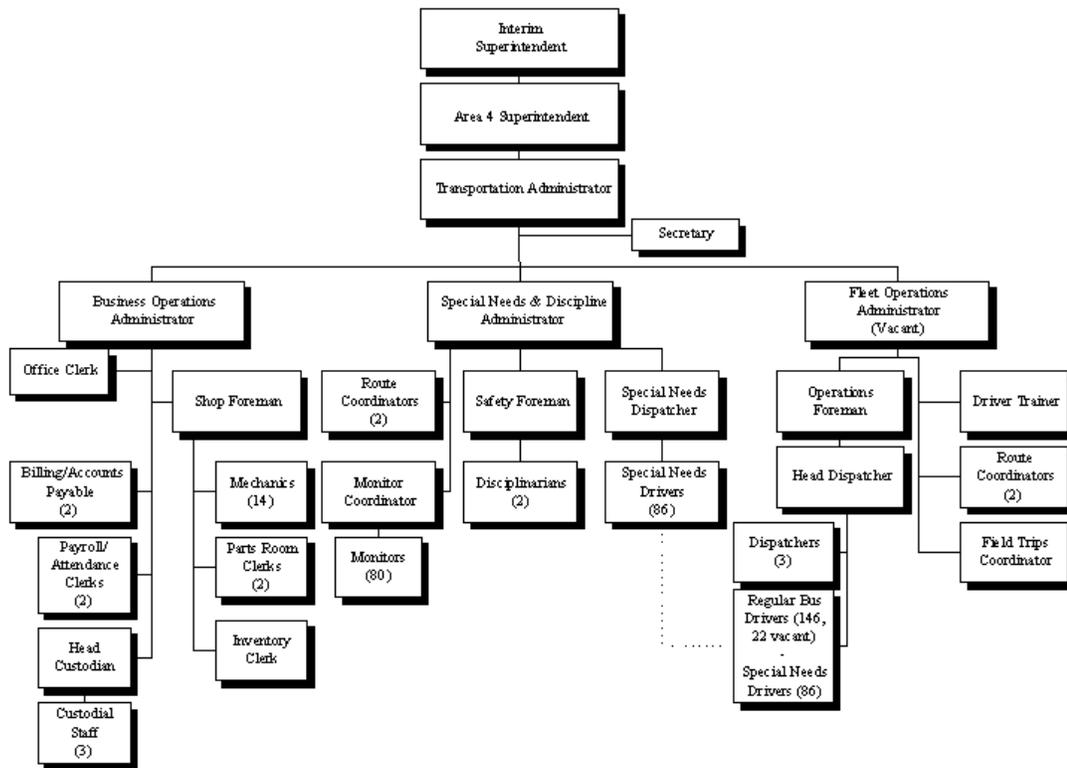
Source: BISD Transportation Department, September 2002.

Chapter 10
STUDENT TRANSPORTATION

A. ORGANIZATION AND STAFFING

BISD's Transportation Department is responsible for the planning and operation of transportation services for regular, CATE and special program education routes. In addition, the department provides transportation resources for extracurricular activities and offers field trip services to all schools in the district. The Transportation Department also maintains the bus fleet and administrative support vehicles.

The Transportation Department employs 387 staff members, including the Transportation administrator, three assistant administrators, one shop foreman, one Operations foreman, 232 permanent bus drivers, one monitor coordinator for special education buses, 80 monitors, 17 maintenance personnel, five dispatchers, five routing and scheduling personnel (two for the regular program, two for the special education program and one for field trips), four training and safety personnel and 10 clerical and support staff.

The Transportation administrator reports to the area 4 superintendent and has been in the position since 1999-2000. The administrator is certified by the Texas Association of Pupil Transportation (TAPT) as a Texas Pupil Transportation Official and has been elected to serve as one of five area directors for the association. TAPT is an organization dedicated to promoting safe and efficient pupil transportation for Texas public school districts. TAPT provides workshops, certification courses and other forums for school district transportation professionals to exchange ideas and ultimately improve pupil transportation policies, standards and equipment on the local, state and national level. The Transportation administrator is also certified as a Transportation Director by the National Association for Pupil Transportation. The mission of the National Association for Pupil Transportation (NAPT) is to promote safety and enhance efficiency in pupil transportation through local, state and national transportation initiatives and to provide professional growth opportunities for pupil transportation professionals.

The BISD Transportation Department revised the organizational structure for 2002-03. The department has three assistant administrators overseeing transportation operations for the regular program, the special education program and the department's business functions.

The Business Operations administrator oversees the department budget, purchase requisitions, bids and cost analysis. Personnel reporting to the

Business Operations administrator include several clerks; two processing accounts payable and two payroll and employee attendance clerks. The shop foreman supervises the maintenance facility, 14 mechanics, two parts and inventory personnel and four custodians.

The Fleet Operations administrator position is vacant, and the Business Operations administrator is covering these duties. Responsibilities include overseeing the regular program route coordinators, field trip coordinator, dispatchers and drivers. Duties associated with technology and computers also belong to the Fleet Operations administrator position.

The Operations Foreman reports to the Fleet Operations administrator and is responsible for supervising 146 regular program drivers and the dispatchers. Dispatchers are responsible for radio communication between the buses, schools and community at all times.

The driver trainer also reports to the Fleet Operations administrator. The trainer works with BISD's Human Resources Department to recruit and hire bus drivers and checks Commercial Driver's License (CDL) qualifications as well as CDL expiration for existing bus drivers. The driver trainer also conducts new driver orientation, driver evaluations, in-service training meetings and re-training curriculum required for drivers involved in accidents.

Route coordinators develop routes, schedule driver route assignments and prepare the reports on miles and riders required by TEA. The field trip coordinator processes all extracurricular trips previously approved by upper management. BISD services approximately 100 - 150 field trips per week. The coordinator also assigns drivers field trip routes on a rotating basis so as to minimize drivers incurring overtime.

The Special Needs and Discipline administrator is responsible for 86 special education drivers, the Special Needs dispatcher and route coordinators, the safety foreman, two disciplinarians, the monitor coordinator and 80 monitors. Monitors observe and assist students on the special education routes including the three-year old program and the Teen Pregnant Assistance Program (TPAP). Monitors are not required to hold a CDL.

The safety foreman conducts monthly safety meetings with all Transportation Department employees, tracks driver incidents and conducts site investigations of bus accidents. Disciplinarians work closely with the safety foreman in tracking and reporting discipline and behavior incidents on the buses.

FINDING

Drivers, monitors, mechanics and office personnel in the Transportation Department are represented through a Management by Objectives (MBO) committee. The purpose of the MBO is to establish an orderly process for open communication between the management staff and the Transportation Department employees. In October 2002, *School Bus Fleet* magazine recognized BISD for the MBO committee and its positive impact on the department when honoring BISD with the "Great Fleets Across America" award.

The organization of the Transportation Department changed several times with the frequent turnover of the Transportation administrator position since 1990. Therefore, in 1999-2000, the Transportation administrator implemented the MBO committee in an effort to smooth another transition and to implement positive changes. Numerous transitions in management and policies had negatively affected morale and communication throughout the department. The MBO was designed to function in an advisory capacity for solving common concerns and creating procedures for effective communication.

The MBO is comprised of eight drivers, two monitors, one mechanic, one dispatcher and one administrative employee. The drivers are grouped by longevity in the department and each group has two representatives that are elected from each experience group: 16+ years, 10-15 years, 6-10 years and 0-5 years. Peers elect MBO members for a one-year term and all positions are voluntary.

The MBO has regular monthly meetings. Occasionally additional meetings are organized when a new department policy is being introduced or if a group of Transportation personnel submits a request to discuss an issue. The committee has fostered discussions about driver pay rates, salaries of surrounding districts and a policy of route choices by seniority.

The by-laws state that the MBO will support the goals and objectives of the department and exhibit professionalism. The MBO members who met with TSPR were very positive about the committee and believe their opinions are documented and contribute to improvement of the department. Employees that are not members of the MBO are invited to observe meetings if they are interested. In addition, the committee may invite others to participate or present at a meeting when an agenda item pertains to them. Speakers are allowed five minutes for a presentation; however, an agenda form must be submitted two days in advance for review by the MBO Chairperson.

COMMENDATION

BISD's Management by Objectives committee represents initiatives to improve communication and resolve problems between the Transportation Department's management and staff members.

FINDING

The BISD starting wage rate for a school bus driver of $7.81 per hour is below the starting wage rate of most neighboring districts in the Rio Grande Valley and is causing turnover in first-year drivers. Driver rates are only three percent higher than BISD starting rate for a monitor. A competitive driver salary is critical to attracting new drivers. Hiring and training new drivers entails many up-front costs. The Transportation administrator, the driver trainer and several members of the MBO committee commented that many drivers leave BISD after completing their training and work for districts in the area paying a higher rate.

The wage rate for a school bus monitor is $7.55 per hour. A school bus monitor is not required to earn a CDL and does not have the same responsibility as a driver. During interviews with the review team and in a MBO focus group, several staff members said that there is little incentive to take on the responsibility associated with being a bus driver when the monitor and driver starting rate differential is so small. The MBO committee said that drivers strongly believe the professional responsibility of a school bus driver should be considered in classifying the position and setting the pay grade and starting salary.

In May 2000, a group of drivers formed a sub-committee of the MBO to research the salary issue. The study was called the Sub-Committee of Salaries Study. BISD drivers created the initiative to use as support in requesting a salary increase. The research was successful in attaining an increase in the starting driver hourly pay from $7.17 to $7.81 in 2000-01. In addition, a pay scale was composed according to years of experience, and the wages of all drivers were adjusted to the yearly minimum rate. **Exhibit 10-16** presents starting hourly rates for bus drivers in BISD and surrounding districts.

Exhibit 10-16
Bus Driver Starting Hourly Rate
BISD and Surrounding Districts (Rio Grande Valley)
2000-01

District	2000-01 Starting Hourly Rate
P.S.J.A.	$8.34

Harlingen	$8.25
Edinburg	$8.00
Weslaco	$7.70
La Joya	$7.38
Mission	$7.35
Brownsville	**$7.17**
San Benito	$7.12
Los Fresnos	$7.06
McAllen	$7.00
Average	**$7.54**

Source: BISD Transportation Department, Sub-committee of Salaries Study, 2000-01 and phone interviews with each district's Transportation Department, December 2002.

Although driver pay was increased in 2000-01, BISD continues to experience driver turnover during the early stages of employment. The Transportation administrator provided documents and letters from previous BISD Transportation Department drivers that relocated to a neighboring district for wage rates of $1.50 per hour more than BISD offers. **Exhibit 10-17** presents BISD and the peer districts' starting driver hourly pay for 2002-03. BISD's rate is less than all of the peers and 24 percent lower than the peer average.

Exhibit 10-17
BISD and Peer Districts Driver Starting Rate
2002-03

District	Driver Starting Hourly Rate
Plano	$11.56
Ysleta	$10.37
North East SA	$10.00
Peer Average	**$9.72**
Corpus Christi	$9.51
Laredo	$9.05
Brownsville	**$7.81**

Laredo ISD (LISD) regularly monitors driver pay rates in surrounding districts and adjusts them as needed. LISD pays a competitive wage rate for school bus drivers and mechanics. Bus drivers are paid between $9.05 and $13.01 per hour depending on longevity with the district and the Transportation Department. Employees said that the level of pay was a prime factor in deciding to work for the LISD.

Recommendation 82:

Improve driver turnover by increasing bus driver salaries.

The district should increase the minimum pay of drivers to $8.25 per hour. In addition, since this is a 5.6 percent increase over the starting rate of $7.81, the wage rates for all drivers should also be increased by 5.6 percent.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Transportation administrator and the Business Operations administrator develop a proposal, including costs and rates being earned at neighboring districts.	March 2003
2.	The Transportation administrator submits a request and proposal to the superintendent and board to increase the hourly rate of all drivers by 5.6 percent.	April 2003
3.	The board approves the request and driver hourly wages are increased.	May 2003

FISCAL IMPACT

The fiscal impact of increasing the hourly rate of all full-time drivers by 5.6 percent is an annual cost of $149,023. **Exhibit 10-18** presents hourly wages of BISD drivers before and after the 5.6 percent increase.

Exhibit 10-18
BISD Driver Rate per Hour - All Drivers
Current and After 5.6 Percent Increase

Current Rate per Hour	Drivers at each Rate per	Cost of Drivers per Hour	Rate per Hour after	Cost of Drivers per Hour

	Hour		5.6 Percent Increase	after 5.6 Percent Increase
$7.81	21	$164.01	$8.25	$173.25
$7.85	2	$15.70	$8.29	$16.58
$8.08	16	$129.28	$8.53	$136.48
$8.12	1	$8.12	$8.57	$8.57
$8.14	13	$105.82	$8.60	$111.80
$8.17	1	$8.17	$8.63	$8.63
$8.20	3	$24.60	$8.66	$25.98
$8.25	11	$90.75	$8.71	$95.81
$8.30	13	$107.90	$8.76	$113.88
$8.32	5	$41.60	$8.79	$43.95
$8.38	13	$108.94	$8.85	$115.05
$8.44	12	$101.28	$8.91	$106.92
$8.50	1	$8.50	$8.98	$8.98
$8.55	2	$17.10	$9.03	$18.06
$8.56	3	$25.68	$9.04	$27.12
$8.62	28	$241.36	$9.10	$254.80
$8.68	5	$43.40	$9.17	$45.85
$8.74	2	$17.48	$9.23	$18.46
$8.78	9	$79.02	$9.27	$83.43
$8.90	10	$89.00	$9.40	$94.00
$8.93	2	$17.86	$9.43	$18.86
$8.96	8	$71.68	$9.46	$75.68
$9.16	7	$64.12	$9.67	$67.69
$9.20	6	$55.20	$9.72	$58.32
$9.23	4	$36.92	$9.75	$39.00
$9.40	1	$9.40	$9.93	$9.93
$9.48	6	$56.88	$10.01	$60.06
$9.51	1	$9.51	$10.04	$10.04

$9.53	1	$9.53	$10.06	$10.06
$9.58	1	$9.58	$10.12	$10.12
$9.62	1	$9.62	$10.16	$10.16
$9.63	7	$67.41	$10.17	$71.19
$9.89	2	$19.78	$10.44	$20.88
$9.91	6	$59.46	$10.46	$62.76
$10.00	1	$10.00	$10.56	$10.56
$10.09	4	$40.36	$10.66	$42.64
$10.11	1	$10.11	$10.68	$10.68
$10.19	1	$10.19	$10.76	$10.76
Total Cost of Drivers per Hour	**231**	**$1,995**		**$2,107**

Source: BISD Human Resources Department, September, 2002.

The total cost of implementing this recommendation is calculated as the difference between the total hourly pay for all drivers after the increase and the current total hourly pay for all drivers ($2,107 - $1,995 = $112) multiplied by 6 hours per day for 198 days per year plus variable benefits ($112 x 6 hours x 198 days x 1.12 variable benefits rate = $149,023). The fixed benefit cost of $3,483 is already budgeted for before the pay increase and is not included as an additional cost.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Improve driver turnover by increasing bus driver salaries.	($149,023)	($149,023)	($149,023)	($149,023)	($149,023)

FINDING

BISD does not have enough drivers to operate all daily routes, and there is no substitute driver or monitor pool. On a daily basis, mechanics, dispatchers and route coordinators are required to drive school bus routes or cover monitor duties. Because there is no substitute drivers, any driver or monitor absence adversely affects the district's ability to provide timely and high quality transportation services.

In 2002-03, the district is operating 231 routes, 39 of which are running double elementary routes in addition to three-tier routes, with only 232 total drivers for both the regular and special program. The district has 22 budgeted driver positions vacant. The Transportation administrator said there is a need to hire 10 of the 22 budgeted positions to run all daily routes, if there were no absences. The additional 12 are necessary to cover for absences and injuries.

The review team analyzed the total absences for drivers and monitors during a four-month sample period during 2001-02. The data indicates that an average of 12 drivers and monitors are absent daily as presented in **Exhibit 10-19**. Therefore, approximately 22 other Transportation personnel are needed to operate routes on a daily basis. **Exhibit 10-19** displays the total and average driver and monitor absences that occurred from January through April 2002 at BISD.

Exhibit 10-19
BISD Total and Average Absences, Drivers and Monitors
January through April 2002

Month	Total Absences Drivers	Total Absences Monitors	Total Absences Drivers and Monitors	Total Work (Paid) Days Per Month	Average Daily Absences Drivers and Monitors
January	99	59	158	18	8.8
February	155	57	212	20	10.6
March	169	50	219	14	15.6
April	199	79	278	20	13.9
Total	**622**	**245**	**867**	**72**	***12.0**

Source: BISD Transportation Department, September 2002.
*Note: Total absences for January through April 2002 divided by total work days during these months (867 / 72 = 12.0).

In order to manage 10 open routes and the absenteeism of approximately 12 drivers and monitors each day, mechanics, dispatchers, route coordinators and all levels of administration personnel, including the director of Transportation at times, are required to cover routes and extracurricular trips, or a variety of other positions in the department. For

example, while mechanics and dispatchers are driving routes, employees such as the Operations foreman or an administrator will operate the dispatch duties. Absent monitors are also covered for by administration and clerical personnel and administrative duties are put on hold until the routes are completed.

Inadequate staffing and a lack of a substitute pool create two costly issues. First, using other staff to cover for absences prevents them from focusing on their own duties. Repairs on buses are delayed while mechanics are driving four hours a day. Dispatchers are specialized in field supervision and radio communication between the schools, parents and school bus drivers. When other personnel are covering dispatch duties, the result is a less efficient department. BISD is not taking advantage of the knowledge and experience for which many of the employees were hired, nor is the district effectively using the resources spent on training specialized personnel.

A second issue resulting from multiple personnel covering driver positions is the increase in overtime costs. Full-time drivers are needed to drive double or triple routes and additional extra-curricular trips for more than 40 hours a week. In addition, mechanics spending several hours a day driving routes rather than servicing vehicles work overtime to complete their vehicle maintenance duties.

BISD is incurring an average of $12,416 per month in overtime expenses as presented in **Exhibit 10-20**. The Transportation Department has made efforts to decrease overtime for several years and this issue inhibits their ability to reach this goal. **Exhibit 10-20** lists BISD's total and average overtime expenditures for drivers, monitors and mechanics for the period January through April 2002.

Exhibit 10-20
BISD Actual and Average Overtime Expenses - Drivers, Monitors and Mechanics
January through April 2002

Month	Overtime Expenses DRIVERS	Overtime Expenses MONITORS	Overtime Expenses MECHANICS	TOTAL Overtime Expenses
January	$4,158	$657	$642	$5,457
February	$10,704	$1,822	$1,286	$13,812
March	$13,507	$2,447	$1,147	$17,101
April	$9,605	$3,158	$532	$13,295

TOTAL	$37,974	$8,084	$3,607	$49,665
Monthly Average	$9,494	$2,021	$902	$12,416

Source: BISD Transportation Department, September 2002.
*Note: BISD and peer districts were interviewed about the issue of hiring substitute drivers. The districts' management believes substitute drivers are difficult to recruit since they usually seek permanent employment and a minimum of 20 hours per week. However, there are on average 12 driver and monitor absences occurring on a daily basis and BISD's drivers and monitors work at least six hours each day. Therefore, **Exhibit 10-18** shows that BISD substitutes are needed at least 20 hours per week.*

School district functions depending on a large service work force cannot provide adequate service without being prepared for employee absences. Effective service departments create a pool of trained substitute, temporary or contract positions to cover permanent employees in the case of absences or positions vacancy.

Dripping Springs ISD's (DSISD's) food service department has implemented an innovative solution to this problem by filling new positions from a pool of trained and readily available substitute workers. DSISD implemented this solution to provide the department with a trained pool of readily available substitute workers. In addition, this practice ensures that new hires are compatible with the department and the kitchen in which they are placed before their employment becomes permanent.

Recommendation 83:

Immediately fill the positions for all unassigned routes and hire a pool of permanent, part-time drivers to manage absenteeism and overtime expenditures.

BISD should continue its efforts to cover open routes and immediately hire 10 of the 22 budgeted positions. To address the issue with a lack of candidates seeking temporary or substitute work, the district should build a pool of permanent, part-time employees. The permanent status will alleviate some problems occurring with recruiting substitute positions. Hiring part-time drivers will also provide trained and available drivers to replace full-time drivers if vacancies occur; therefore, avoiding the waiting period while employees are recruited and completing the application and hiring process. The district should target driver recruitment to individuals

such as retirees who are interested in flexible schedules and limited work hours.

Hiring part-time drivers that work 20 hours per week will also add to the department's efforts to decrease overtime expenditures. When the number of drivers and substitutes is adequate for BISD's operation, the mechanics will not need to drive routes and will be able to complete their duties without working overtime. Drivers and monitors should be able to complete their assigned routes and extracurricular routes within 40 hours per week. In addition, the district will not incur the cost of full-time benefits.

The data presented in **Exhibit 10-21** indicates BISD needed an average of 18 substitute drivers working at least 20 hours per week during the period of January through April 2002. **Exhibit 10-21** uses the average number of driver and monitor absences calculated in **Exhibit 10-21** to determine the minimum number of substitutes that the district needed during the sample period to cover absences without ineffectively placing various personnel in substitute positions. The district should add nine part-time driver positions as a conservative estimate for the need presented in **Exhibit 10-21**.

Exhibit 10-21
BISD Number of Substitute Driver and Monitors Needed Twenty Hours Per Week
January through April 2002

Month	Total Absences Drivers and Monitors	Average Daily Absences Drivers and Monitors	Average Daily Substitute Hours Needed*	Average Weekly Substitute Hours Needed	Number of Substitutes Needed Twenty Hours Per Week
January	158	8.8	52.8	264	13.2
February	212	10.6	63.6	318	15.9
March	219	15.6	93.6	468	23.4
April	278	13.9	83.4	417	20.9
Average	**217**	**12.0**	**72.0**	**360**	**18.0**

Source: BISD Transportation Department, September 2002.
*Note: Six hours per workday times average daily absences.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Transportation administrator submits a request to the driver trainer to work with the BISD Human Resources Department to immediately recruit and hire 10 of the authorized full-time drivers and nine permanent part-time drivers.	March 2003
2.	The driver trainer seeks part-time drivers from individuals interested in part-time work, such as retirees and parents with children in school.	March - June 2003
3.	The driver trainer, with approval from the Fleet Operations administrator, hires 10 full-time and nine part-time drivers.	June 2003
4.	The Fleet Operations administrator reviews driver hours regularly to monitor overtime and the need for additional part-time drivers.	June 2003 and Ongoing

FISCAL IMPACT

Adding nine part-time drivers and reducing overtime expenditures will result in an annual savings of $63,524. Net savings are calculated by estimating the savings in overtime costs and subtracting the cost of the additional part-time drivers. The annual wages for nine part-time drivers is estimated as $55,670 ($7.81 x 4 hours per day x 198 days x 9 drivers).

The district's average monthly overtime is $12,416 as presented in **Exhibit 10-20**. The estimated annual overtime savings is calculated assuming the district will reduce overtime hours by at least 80 percent, resulting in an annual savings of $119,194 ($12,416 x .80 x 12 months). The salaries for the 10 full-time driver positions to be hired are already authorized and included in the Transportation Department's budget for 2002-03; therefore, there are no costs included for these wages.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Immediately fill the positions for all unassigned routes and hire a pool of permanent, part-time drivers to manage absenteeism and overtime expenditures.	$63,524	$63,524	$63,524	$63,524	$63,524

Chapter 10
STUDENT TRANSPORTATION

B. ROUTING AND SCHEDULING

BISD's Transportation Department operated more than 215 routes in 2000-01 including 126 regular routes and 80 special education routes with curb-to-school and monitor service, five alternative center routes and four Teen Parenting Assistance Program (TPAP) routes. Most of the regular and special education routes (about 95 percent) operate three-tier each morning and afternoon by picking up an elementary, middle school and high school route. Three-tier systems use fewer buses and drivers since one bus runs three separate routes one for each school level instead of having three buses each run one route. BISD's regular program averages 96 student riders per bus.

In addition to operating three-tier trips, 39 of the regular routes run double elementary trips. The Transportation Department also operates routes for extracurricular trips, the three-year old program, the Teen Parenting Assistance Program, alternative programs, tutorials and athletic team practices.

The route coordinator and one assistant coordinator schedule routes for all regular program trips. The route coordinator uses a combination of scheduling software and manual adjustments. Special education routes are scheduled only manually.

FINDING

BISD follows procedures to improve route efficiency and increase customer service. The district uses staggered bell times at each school level allowing buses to operate the three tier-systems. Staggered bell times reduce the vehicle and driver requirements and maximize resources often reducing the time students spend on a bus ride and preventing mixing students of different ages.

BISD is following the bell schedule displayed in **Exhibit 10-22**.

Exhibit 10-22
BISD Bell Schedule
2002-03

School Type	School Hours
High Schools	8:50 - 4:00

Middle Schools	7:45 - 2:45
Elementary Schools	8:15 - 3:15
Pre-K AM	8:50 - 11:50
Pre-K PM	11:55 - 3:15
All day Pre-K	8:30 - 2:30

Source: BISD Transportation Department.

The district also has a cluster-stop policy for regular student riders to provide more efficient bus trips. Students are picked up in groups at designated stops located throughout the communities. BISD chooses cluster locations to decrease the number of stops made by each bus while ensuring that no student has to walk too far to be picked up. Each cluster stop is designed to optimize the balance between distance for students to walk and miles for buses to travel.

These two policies being followed by the district improve the performance of its operations and therefore increase customer satisfaction. Surveys results from district parents are displayed in **Exhibit 10-23** and indicate a positive level of satisfaction with the transportation services that BISD is delivering to their children.

Exhibit 10-23
Parent Survey Comments about BISD Transportation
August 2002

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
The length of the student's bus ride is reasonable.	14.1%	39.1%	30.4%	8.7%	4.3%	3.3%
The drop-off zone at the school is safe.	25.7%	42.4%	21.4%	6.2%	1.8%	2.5%
The bus stop near my house is safe.	20.7%	39.9%	24.3%	6.9%	4.7%	3.6%
The bus stop is within walking distance from	21.4%	44.2%	25.4%	3.6%	2.9%	2.5%

our home.						

Source: TSPR Survey Responses, September 2002.
Note: While these Surveys were not scientifically administered, 2,000 parents surveyed and 276 responded. The results are included here to show the general opinion of that responding.

COMMENDATION

BISD uses staggered bell times and cluster stops to improve the performance of bus routes and increase customer satisfaction.

FINDING

BISD is in the process of installing a new electronic scheduling system called Transfinder which the district purchased in 2001-02. Transfinder has the capability to automate route scheduling for both regular and special education. Previously, the route coordinator for the regular program used a combination of EcoTran, a bus routing software program, and manual adjustments. EcoTran did not have the capability to automate special education routes; therefore, all special education routes were designed manually.

Transfinder takes into account various parameters that allow transportation operations to completely automate routing including fleet size, seating capacity, safety concerns, district policies, environmental conditions, traffic patterns and railroad crossings. Transfinder will also take into account the special needs of different types of students; therefore, this system will create a more efficient route design and should decrease route scheduling labor hours by about 15 percent.

COMMENDATION

BISD purchased a new routing software package that will increase the efficiency of the district's transportation operations by automating the special education component of the department's route scheduling.

Chapter 10
STUDENT TRANSPORTATION

C. MANAGEMENT PRACTICES

A school district may operate student transportation in-house or choose to contract with a commercial transportation company, mass transit authority or county transportation system to provide some or all of its transportation services. BISD entered into a contract with a private transportation company in 1992. Outsourcing the Transportation function produced unsatisfactory services and the district reversed the decision after nine months.

The Transportation Department has published standard operating procedures (SOP). Policies for the regular transportation program are in the BISD handbook provided to each student at the beginning of the school year and the student's parent must sign a form to acknowledge receipt of the handbook. In addition, the Special Needs staff recently developed a comprehensive Special Needs handbook for school administrators, parents, drivers and monitors.

The Business Operations administrator evaluates the Transportation Department's performance based on manual graphs and charts. Figures reported internally to the Transportation administrator are routes vs. drivers, average driver absences, overtime hours, average annual mileage of buses, road calls per month, annual program costs per mile and budget totals.

FINDING

BISD's Transportation Department recognizes the need to provide quality field trip services to the schools, but that the offerings are costly to the department. The department supports efforts to ensure the service provided to extracurricular and field trip customers is acceptable. In addition, since the state does not reimburse districts for extracurricular miles, BISD customers are charged an appropriate fee to recover costs of the service.

Prior to 2001-02, the department experienced a high level of complaints about extracurricular routes and investigations of the problems were resulting in many conflicting stories between the drivers and event sponsors.

BISD implemented the evaluation policy in 2001-02. Sponsors and drivers of BISD extracurricular events fill out evaluation forms on each other for

all trips. The field trip coordinator who has been in the position for 23 years, said the initiative has significantly decreased complaints and improved customer satisfaction and the drivers' attitudes.

Driver evaluation forms include questions about the driver's promptness, speed driven, appearance, bus cleanliness and knowledge of the route. Evaluation questions about field trip sponsors include verification that they enforced the driver's bus rules, communicated the itinerary correctly when requesting the trip and ensured the students leave the bus clean.

The Fleet Operations administrator reviews all evaluation forms. Problems are addressed and corrected immediately and compliments from event sponsors are forwarded to drivers. Positive recognition of work activity supports continued efforts to improve performance.

The Transportation Department also implemented a system to improve the efficiency of extracurricular and field trip procedures. The Transportation Operations Management System (TOMS) was implemented in 2002-03 and is being used to automate field trip scheduling and billing. TOMS has the capability to electronically process requests from user departments and schedule extracurricular routes.

BISD's field trip customers are positive about the procedures for requesting buses. To determine perceptions about the services provided, the review team surveyed BISD principals and assistant principals. Survey answers resulted in 91.3 percent of respondents agreeing or strongly agreeing that the Transportation Department has a simple method to request buses for special events.

The Transportation Department prices field trips at a fully allocated rate per mile. BISD user departments are charged at a rate $3.06 per mile whereas some Texas school districts charge less than $1.50 per mile. School districts are not eligible for state reimbursement for field trip miles and a school district must use local funds to pay for costs incurred from driver wages, fuel and mileage for field trip services.

BISD establishes the field trip rate to be charged to user departments each year based on the previous year's regular program cost per mile as reported in the TEA Operations Report. BISD calculates the cost per mile by using the total annual cost of the operation and dividing it by the total annual mileage. The district's field trip rate was $3.04 per mile in 2001-02 and $2.79 per mile in 2000-01.

The Transportation Department operates 100 to 150 extracurricular and field trips each week. The driving staff is not large enough to handle more than this demand without incurring high overtime expenditures. BISD's

field trip billing structure serves to recover driver hourly rates and other operating costs incurred in operating the additional routes. The revenue earned also contributes to the capital costs for buses being used over the longer distances usually traveled during extracurricular and field trips.

Schools and departments have the choice to contract for private bus service in lieu of school buses from BISD. The Transportation administrator and field trip coordinator said that some user departments comment that the district rate is high and at times use private charter companies. The Transportation Department does not track data on the frequency of BISD departments choosing private transportation over the district's bus service. However, field trip personnel estimate that about 95 percent of field trips located outside of the Valley area of south Texas, or greater than 200 miles from Brownsville and about five percent of extracurricular trips in Brownsville are taken through an alternate private service.

COMMENDATION

BISD's Transportation Department provides exemplary field trip and extracurricular services that focuses on customer satisfaction and cost issues.

FINDING

The director of Transportation has not adopted a formal performance-monitoring program to measure service quality, effectiveness and efficiency. Trend analysis is limited to a four-year history of standard data reported to TEA; therefore, this data is calculated and reported primarily to complete the TEA requirements.

Evaluation of TEA data revealed a misinterpretation by the Transportation Department on the TEA report instructions for calculating program mileage. The Transportation administrator of Transportation and the Routing coordinator for Special Needs could not explain why the number of extracurricular miles for the special education program increased 486 percent from 1999-00 to 2000-01 (7,126 miles increased to 346,394). Investigation by the review team, the Transportation administrator, the Business Operations administrator and the previous Business Operations administrator uncovered an incorrect mileage classification on the district's TEA report. The 486 percent increase is not accurate; however, the district was not aware of the overstated and incorrect value until questioned by the review team.

The misclassification results in a misleading performance indicator; however, no controls or analysis are in place to uncover possible errors

before they are reported. Since the incorrect value is on extracurricular mileage and these miles are not reimbursable, there is no effect on funding. However, it indicates that regular analysis is not practiced and an error effecting funding could take place if monitoring is not formalized. BISD is processing an adjustment with TEA for the 2000-01 report.

The cost figures for regular program transportation in 2000-01 of $2.54 per odometer mile and $1.77 per student rider are both the lowest of the BISD peer group. The Transportation administrator makes many efforts to control costs, but does not have a formal procedure for acquiring and comparing the district's performance to other districts. The lack of regular and formal cost analysis does not allow the Transportation Department to easily report achievements or gain recognition from the district and peers.

The Transportation administrator and Business Operations administrator showed the review team several reports that are being developed to analyze performance data on indicators such as route efficiency, overtime expenditures and accidents per year. Data analyzed on only an annual basis indicates performance for a given time period; however this analysis limits actions that can be taken before a function causes a decrease in efficiency.

Formally setting and monitoring performance benchmarks play a critical role in controlling the efficiency of an organization's operations. Performance benchmarks are set standards that can be used to determine improvements in cost-efficiency, customer service, the level of training employees need, staffing needs, effectiveness of preventive maintenance programs, trends in repeat failures and unscheduled maintenance.

Tracking and monitoring performance benchmarks can help upper management and staff members recognize achievements in areas performing well to support continuous improvements in standards already accomplished. Communicating performance to staff members helps employees to recognize their roles in the achievements, improvements and weaknesses of the department.

Setting up a methodology for reporting and evaluating performance can uncover inconsistencies when they occur and therefore reducing the opportunities for reporting errors. The administrator said understanding and improving the performance methodology of the department is a primary goal and very important to the success of the department. **Exhibit 10-24** displays performance indicators that many Texas school districts use to set performance benchmarks.

Exhibit 10-24
Suggested Performance Measures

Performance Indicator	
Safety • Accidents per 100,000 miles • Student referrals per 1,000 students bused • Annual hours of driver retraining • Driver incidents	*Service Quality* • On-time performance • Driver absenteeism
Costs • Operations cost per mile - Regular • Operations cost per mile - Special • Operation cost per rider - Regular • Operation cost per rider - Special	*Maintenance* • Preventive maintenance (PM) scheduled • Percent PM completed on time • Turnover time per bus repair • Miles between road calls or breakdowns
Service • Riders per route mile - Regular • Riders per route mile - Special • Riders per bus - Regular • Riders per bus - Special • Route miles per bus - Regular • Route miles per bus - Special	

Source: Reporting data required for TEA School Transportation Operation Report and TEA School Transportation Route Services Report.

School districts with efficient operations programs set performance and cost-efficiency goals that are comparable to industry standards and peer district operations. Performance data is collected on a consistent basis measured against the department's goals and reported to the operation's employees and district stakeholders.

Recommendation 84:

Develop benchmarks and a methodology for collecting and reporting data for monitoring the department's performance on a regular basis.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Transportation administrator works with the Business Operations administrator to adopt key performance indicators for assessing the department's performance and sets target benchmarks.	March 2003
2.	The Transportation administrator communicates the benchmark system and policies to the department staff members, including how each benchmark is affected by the individual Transportation functions.	May 2003
3.	The Business Operations administrator establishes a quarterly procedure for monitoring all indicator benchmarks.	May 2003
4.	The Business Operations administrator analyzes and reports performance indicators and benchmark achievements to the Transportation administrator on a quarterly basis.	August 2003 and Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 10
STUDENT TRANSPORTATION

D. SAFETY AND TRAINING

The Transportation Department's safety and training efforts are completed by various personnel. BISD employs one driver trainer, one monitor coordinator, one safety foreman and two disciplinarians.

The driver trainer assists BISD personnel with recruiting and hiring drivers including CDL and driving record checks. The trainer reviews motor vehicle records of all driving personnel two times per year, performs formal annual driver evaluations and maintains a list of CDL expiration dates. CDL expirations are reviewed and enforced on a monthly basis. New drivers for the regular program undergo training with the driver trainer and new monitors complete training with the monitor coordinator. The driver trainer investigates driver accidents in the field, ensuring that all procedures are followed including a mandatory drug test, photos of the site, retraining if necessary and incident report processing.

The safety foreman's duties include presenting safety seminars to all Transportation personnel, assisting with driver spot checks, supervising the disciplinarians and assisting with site investigations in the field. Disciplinarians process discipline reports and facilitate communication about incidents between the principals and the bus drivers. The Transportation Incident Reporting System (TIRES) software is used to track student discipline incidents.

FINDING

The Transportation Department has cameras on regular route buses to monitor driver performance and student discipline on school buses. Some special education buses and older buses do not have cameras yet, but the district plans to have all buses equipped with the system by the end of 2002-03.

The camera video tapes are reviewed and recycled every five days. BISD has an Inventory clerk that is responsible for bus parts and supplies part-time while also overseeing the rotation and storage of the video tapes. The district plans to hire a full-time position to manage the inventory of video tapes. Ten random videos are partially viewed each day to ensure cameras are operating properly. The driver trainer spot checks video tapes to evaluate driver performance on a monthly basis.

The cameras are popular with the drivers. During the study team's interviews, staff members said they support use of cameras because they control student discipline, provide a mechanism for drivers to defend themselves if they are accused of inappropriate behavior and provide proof to principals and parents when a student misbehaves.

COMMENDATION

BISD uses cameras on school buses to record student behavior, evaluate drivers and assist in managing student discipline.

FINDING

The Transportation Department uses a database to document incidents in student discipline and analyze trends to identify recurring problems and develop appropriate action plans. TIRES is an Internet service that creates a useful database tied to an electronic mailing system. Incidents and discipline problems are reported as "referrals" through e-mail to school administrators. Summary reports of incidents entered in the database and referrals addressed, or not addressed, are created in TIRES by school.

The disciplinarians monitor the database and summary reports to ensure the school administrator addresses and responds to the referral. School districts with effective discipline management programs implement efforts to track incidents and ensure consistent treatment to violators. Complete follow-up of all incidents displays to BISD students and drivers that poor behavior is unacceptable and does not go unpunished.

To determine the perception of behavior and discipline on the buses, the review team surveyed BISD students and parents. Surveyed individuals were asked to respond to the comment, "The bus driver maintains discipline on the bus." Survey results indicate that 76 percent of students and 79 percent of parents that responded to this question agreed or strongly agreed with this comment about discipline on the bus.

COMMENDATION

BISD tracks discipline incidents to ensure students and drivers are held accountable for actions and disciplined appropriately.

FINDING

The district emphasizes safety and training and has experienced department improvements since 2000-01 in accidents per year and Workers' Compensation claims.

The Transportation Department provides training opportunities for drivers and monitors during each BISD in-service day (approximately 18 days per year). Activities at Transportation in-service days generally require attendance from 6:30 a.m. to 4:00 p.m. and include topics such as fire extinguisher training, sexual harassment, "Handling Different Age Groups on the bus," billing and attendance administrative issues, evacuation exercises, basic first aid, perfect attendance recognition and accident free pins. The drivers and monitors who met with TSPR expressed appreciation for the training and believe the time and attention improves their ability to provide a quality professional service to the district.

The Fleet Operations administrator monitors accidents per year. Accidents are classified as preventable or non-preventable. Preventable accidents decreased from 65 to 47, or 28 percent, from 2000-01 to 2001-02.

The Transportation Department has the lowest dollar amount of workers' compensation claims in the district. Considering the physical activities involved in getting on and off buses, working with heavy machinery in the maintenance shop and potential injuries that can be incurred during driving accidents, low injury claims indicates a safely planned operation. **Exhibit 10-25** presents the number of claims, total costs incurred and average cost per claim between September 1, 2001 and December 31, 2001 for the listed BISD departments.

Exhibit 10-25
BISD Workers' Compensation Claims
September 1, 2001 through December 31, 2001

Department	Number of Claims	Percent of Total	Total Incurred	Percent of Total	Average Cost per Claim
Transportation	44	9.7 %	$32,675	7.3%	$743
Custodial	46	10.2%	$61,549	13.8%	$1,338
Food Service	100	22.1%	$88,351	19.8%	$884
Maintenance	29	6.4%	$74,989	16.8%	$2,586
Professional	234	51.7%	$188,793	42.3%	$807
Total	**453**	**100.0%**	**$446,357**	**100.0%**	**$985**

Source: BISD Human Resources Department, December 2001.

COMMENDATION

BISD's attention to training and safety issues contributes to cost savings for the district.

E. SCHOOL BUS VEHICLE MAINTENANCE

In 2002-03, the Transportation Department maintains an active fleet of 250 buses and 12 administrative vehicles. The shop foreman, 13 mechanics, one mechanic assistant and two parts personnel and inventory clerk operate the maintenance organization for BISD. Industry standards typically recommend between 20 and 30 vehicles per mechanic and the BISD ratio is 20 to one.

BISD has a skilled mechanical work force. Seven out of 14 mechanics have earned various levels of certification through the Texas Association of School Bus Technicians (TASBT). The shop foreman is also a TASBT instructor.

The district plans to implement a vehicle maintenance information system (VMIS) by Ron Turley Associates (RTA). The RTA system is used for vehicle maintenance, facility and equipment maintenance, preventative maintenance scheduling and parts inventory management.

FINDING

In 2002-03, the BISD Transportation Department shop foreman is leading the first Spanish-translated TASBT school bus annual safety inspection certification class to maintenance personnel. All training documents, workbooks and instruction will be translated to Spanish. The certification will be held at BISD but offered to school bus mechanics from any district.

Mechanics that participated in a focus group with the review team commented that there is no industry training information or workbooks written in Spanish. BISD mechanics are having difficulty acquiring the certifications that will improve their skills and benefit their career. Qualified mechanics are critical for adequately maintaining school buses and better-trained mechanics result in better maintained buses.

It is important for school districts to encourage employees to continuously enhance their skills and identify easily accessible training opportunities so that employees are more likely to participate. Comments from BISD mechanics about the lack of offerings to Spanish-speaking mechanics indicate this is also an issue at surrounding districts. Brownsville and its surrounding areas have a large population of Spanish-speaking residents,

and BISD's sponsorship of this certification course should benefit many Texas school districts.

COMMENDATION

The district is developing opportunities for Spanish-speaking vehicle maintenance personnel at BISD and surrounding districts to acquire certification and professional growth.

FINDING

The district's VMIS is not being used to full capacity for optimization of the preventive maintenance (PM) inspection program. The system has the capability to automatically schedule PM tracking for school buses based on miles of service; however, since its purchase in 1999-2000, this module has not been used.

Preventive maintenance is performed on a bus if identified by a driver or during a repair. Buses are brought into the shop for oil changes, repairs and a bi-annual inspection. Oil changes are completed every 5,000 miles. Mechanics place a sticker inside the bus indicating a mileage at which the driver should notify maintenance personnel for the next oil change. Drivers are directed to check mileage during pre- and post-trip inspection.

In addition, the district implemented a program on November 14, 2002 to have mechanics perform inspections on school buses once every three months. However, the schedule is manual and not automated through the system. Maintenance personnel are only using the VMIS to retrieve historical repair information about the buses and not as an automated scheduling tool for short- and long-term maintenance needs. Mechanics do not have training or access to enter information in the VMIS.

The district has a procedure for reporting any maintenance problems to the maintenance supervisor. Vehicle repair forms are completed by the driver and submitted to the shop foreman. The foreman enters the information into the system and a paper work request is sent to the mechanic crew. The foreman also researches the vehicle maintenance history of the bus to determine if any PM is due to be performed. Mechanics analyze the vehicle and submit a written from to the parts and inventory personnel to request the supplies necessary to complete the repair. The Parts employee then initiates the purchase order process if the parts are not in supply. The VMIS is capable of automating the parts ordering process at the time a mechanic determines items needed to fulfill the work order. The Transportation Department is in the process of entering the parts inventory into the system so this function can be used.

Transportation personnel said that data on each bus is being entered into the system, including mileage and maintenance history, so preventive maintenance can be tied to mileage. Preventive maintenance scheduling data is also partially completed in the district's system.

San Angelo ISD's (SAISD) Maintenance Department plans scheduled maintenance projects in advance over a five-year period. The district keeps a database of the year projects are scheduled to be performed together with the approximate cost to complete the work. By scheduling the projects out five years, SAISD has a basis for allocating maintenance budget amounts and ensuring proper supplies are on hand to perform the maintenance.

Recommendation 85:

Develop a plan to complete implementation and use the preventive maintenance module of the district's vehicle maintenance information system.

The Transportation Department should immediately implement the system's PM module.The preventive maintenance schedule should be developed based on mileage standards. Industry standards recommend between 20 and 30 vehicles per mechanic and BISD's ratio is 20 to one which is adequate for the district's fleet size. Adding a schedule of preventive maintenance duties should not require adding a mechanic position for two reasons.

First, an effective PM schedule often decreases breakdowns resulting in fewer repairs overall. In addition, as the district fills the open driver positions and adds part-time drivers, mechanics should be driving less and therefore have more time to perform PM duties.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Business Operations administrator works with the shop foreman to develop a detailed timeline for completing implementation of the VMIS and PM module.	March 2003
2.	The Business Operations administrator directs the shop foreman to complete the mileage data entry necessary to generate automatic preventive maintenance schedules and the parts and inventory personnel to complete the data entry necessary to automate the ordering process.	March 2003
3.	The shop foreman develops a procedure for assigning preventive maintenance duties as scheduled.	March 2003

4.	The shop foreman meets with the mechanics to explain the new procedure for performing preventive maintenance and the importance of the new process to the life of the bus.	April 2003
5.	The shop foreman implements the new process and provides preventive maintenance schedules to the Operations foreman, the Business Operations administrator and the Transportation administrator to communicate the ongoing procedures.	May 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

Bus repairs are delayed for lack of needed parts. The shop foreman and inventory employees said the purchase order process adds a minimum of four to eight weeks to receive critical vehicle parts.

The two parts room clerks are full-time employees. Their duties are to process orders from maintenance personnel and maintain the shop inventory. The inventory is stored in two bus maintenance bays that have been enclosed to serve as an inventory warehouse. Inventory personnel spend most of their day researching the requested parts for quotes or competitive bids, depending on the dollar amount of the item. Many of the large parts in the inventory storage are approaching obsolescence and are incompatible with the new buses in BISD's fleet. The district attempts to identify and auction these items.

The parts for BISD's transportation fleet are purchased using the district's purchase order process. There are several authorization steps in the process that often take more than four weeks to complete. Further, the parts that are placed through the district's bidding process can take an additional four to eight weeks to obtain approval for purchase. Buses are inoperative while waiting for parts to arrive at the district from four weeks to three months. Delays in waiting for parts make it impossible to provide quick turnaround time on repairs, or to reconcile shop hours with actual hours worked on a maintenance work order. This also decreases the district's ability to analyze the performance and efficiency of the maintenance operation.

The district responded to this issue about bus repair delays. An agreement was made between the Transportation Department and the Purchasing department in January 2002 to process emergency purchase orders (POs) for bus repairs, and it has resulted in POs being assigned on the same day as the repair became apparent. However, the review team heard many

complaints from Transportation personnel during the site visit in September 2002. In addition, no documentation of same-day emergency POs was provided.

Dallas ISD (DISD) issued a request for proposals for a "turnkey on-site vehicles and equipment maintenance parts facility" to outsource parts supply and inventory to a private company. Before outsourcing, the majority of parts were purchased using an open purchase order or an emergency pick-up authorization, which entailed unexpected costs and made control of purchases difficult. DISD's contract requires the private company to provide 85 percent of all parts on demand and 95 percent by the next business day, reducing cost and decreasing repair turnaround time.

Recommendation 86:

Outsource the Transportation Department's parts supply and inventory function to a local private supplier to improve productivity.

The district should negotiate a just in time (JIT) system with the following vendor agreements:

- Full manufacturer's warranties on all parts;
- Guaranteed delivery by next business day;
- On-site replacement at no cost for defective or inferior parts; and
- Monthly reporting and billing.

Outsourcing the parts supply and inventory function will eliminate the need for one parts room clerk position. One employee should remain in this function for maintaining a small parts inventory, assisting with the use and ultimate depletion of the existing inventory and managing the ordering process between maintenance personnel and the private supplier.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The Transportation administrator submits the local supplier request for proposal to the superintendent and board.	March 2003
2.	The Business Operations administrator issues request for proposals from local suppliers.	April 2003
3.	The Business Operations administrator and shop foreman choose a supplier, with approval from the Transportation administrator.	July 2003
4.	The Transportation administrator eliminates one parts clerk position.	July 2003

FISCAL IMPACT

BISD will save $27,921 per year by eliminating the internal parts and inventory function and one parts clerk position. The savings are calculated by taking the average pay of the clerks, pay grade MT-6 and adding annual benefits ([$10.45 per hour x 8 hours x 261 days = $21,820 x 1.12 variable benefits] + $3,483 fixed benefits = $27,921). The savings will begin in 2002-03; however, the position will not be eliminated until the supplier is approved by the board.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Outsource the Transportation Department's parts supply and inventory function to a local private supplier to improve productivity.	$27,921	$27,921	$27,921	$27,921	$27,921

FINDING

The district does not have a formal bus replacement policy. Plans to replace school buses are based on age, and miles of service are not a criterion. In addition, the Transportation Department does not practice the policy of rotating buses to allocate mileage evenly to the fleet.

BISD attempts to replace buses every 10 years, and approximately 20 buses are purchased each year. The Business Operations administrator and the shop foreman could not provide data to confirm the average annual service miles per school bus. Therefore, new bus purchases are not forecasted based on expected miles driven, but they are budgeted for according to the year of purchase.

BISD purchased 60 regular program buses in 1993. However, a review of a sample of these buses indicates the odometer readings range from 30,000 to 186,000 miles. Therefore, all 60 buses will not be in need of replacement at 10 years.

School buses typically have a useful life between 10 and 15 years, or 200,000 miles. TEA recommends a 10-year procurement cycle; however, with an aggressive maintenance program, buses can last 15 years or more.

Exhibit 10-26 lists BISD's fleet inventory by model year as of September 2002.

Exhibit 10-26
BISD Bus Fleet Inventory by Model Year
As of September 2002

Model Year	Number of Buses
1980	1
1982	1
1983	1
1985	3
1986	2
1987	3
1988	3
1993	60
1994	22
1995	24
1997	28
1998	17
1999	31
2000	24
2002	30
Total	**250**

Source: BISD Transportation Department, September 2002.

School districts with effective fleet replacement plans consider many factors affecting the useful life of a school bus. Mileage is a primary indicator of the need for replacing a bus, and many districts evaluate buses for both miles of service and age. Exemplary bus replacement policies also include components such as the cost of maintenance and the type of routes being operated by each bus since some types of service (routes with many stops) may cause more wear and tear on a bus. Furthermore, many districts actually save monies by implementing sound bus replacement policies which ensure the previously mentioned replacement criteria.

Recommendation 87:

Develop and implement a formal school bus replacement policy that includes a plan for rotating buses and is based on the fleet's mileage, age and maintenance records.

The bus replacement plan should be based on an analysis of total miles operated, age and the cost of maintenance. The plan should include a policy of rotating buses to identify which route combinations most evenly accrue mileage and help the district ensure that buses wear evenly. A fleet replacement plan based upon these criteria can provide several advantages. The buses incurring the highest maintenance costs are replaced first. In addition, purchases of new buses should be more evenly scheduled requiring a smaller annual budget allocation rather than a large capital requirement such as BISD's situation in 1993.

The cost of maintenance per vehicle and mileage data will be available automatically when the RTA system is completely implemented.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The shop foreman and personnel continue to collect the data on bus odometer readings and maintenance history for entry into the RTA system.	March 2003
2.	The Business Operations administrator works with the Transportation administrator to revise the bus replacement plan.	March 2003
3.	The Business Operations administrator compiles the necessary data to automate review of average annual mileage.	April 2003
4.	The route coordinator and Business Operations administrator work on a bus rotation schedule based on a detailed evaluation of the routes being operated.	May 2003
5.	The Business Operations administrator works with the Transportation administrator to include bus replacements based on the new plan in the department's budget.	July 2003 and Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 11
FOOD SERVICE

This chapter reviews the Brownsville Independent School District's (BISD's) food service operations in the following sections:

A. Organization and Management
B. Meal Participation
C. Financial Management

The primary mission of a school district's food service program is to provide an appealing and nutritionally-sound breakfast and lunch to students while operating on a cost-recovery basis. The program should provide meals to the students in a safe, clean and accessible environment. Several factors can be used to measure the efficiency and evaluate the effectiveness of a school district's food service operation. Success indicators include providing a high ratio of meals per labor hour (MPLH), minimizing food costs and waste, maximizing student participation in breakfast and lunch programs, providing a variety of meal choices that meet or exceed nutritional standards, reducing the length of time students must wait in line for service and operating a financially self-sufficient program.

BACKGROUND

Efficient food service program management and cost controls can allow a district to operate its food services program on a break-even basis, thereby preventing the need to drain limited dollars away from classroom instruction and the district's general fund. Successfully managed school food service programs provide customer satisfaction and contain costs while complying with applicable federal, state and local board regulations and policies.

The Texas School Food Service Association (TSFSA), a professional organization for school food service employees, has identified 10 *Standards of Excellence* for evaluating school food service programs. TSFSA states that an effective program should:

- Identify and meet current and future needs through organization, planning, direction and control;
- Maintain financial accountability through established procedures;
- Meet the nutritional needs of students and promote the development of sound nutritional practices;
- Ensure that procurement practices meet established standards;

- Provide appetizing, nutritious meals through effective, efficient systems management;
- Maintain a safe and sanitary environment;
- Encourage student participation;
- Provide an environment that enhances employee productivity, growth, development and morale;
- Promote a positive image to the public; and
- Measure success in fulfilling regulatory requirements.

BISD provides more than 6 million lunches to its 42,541 students each year. Over 4 million breakfasts are served each year, with a high percentage of those breakfasts classified as "severe need." The United States Department of Agriculture (USDA) established severe need funding for school breakfast programs serving a large percentage of needy students so that the increased funding would allow schools to serve more nutritious breakfasts. The School Breakfast Program (SBP) regulations

specify that eligibility for severe need reimbursement is established on an individual campus basis using the following criteria:

- The reimbursement rates under the SBP are insufficient to cover SBP costs;
- The campus participates in, or wants to initiate a SBP; and
- Forty percent or more of the lunches served to students at the campus in the second preceding school year were free or reduced-price meals.

In 2002-03, BISD schools that meet eligibility requirements for severe need received an additional $0.02 cents for every lunch served and an additional $0.23 for every reduced-price or free breakfast served.

BISD has 32 elementary schools, 9 middle schools and 5 high schools with cafeterias at each location. In addition, there are 2 alternative education campuses that have kitchen facilities. **Exhibit 11-1** summarizes the number of meals served by the Food Service Department between 1999-2000 and 2001-02. The number of lunches served increased slightly, by 0.2 percent. The number of breakfasts served increased 12.0 percent. Between 1998-99 and 2001-02, the district's Average Daily Attendance (ADA) increased 6.7 percent.

Exhibit 11-1
BISD Food Service Department Meals
1999-2000 through 2001-02

Meal	1999-2000	2000-01	2001-02	Percent Change

				(1999-2000 through 2001-02)
Lunches	6,204,852	5,984,934	6,217,496	0.2%
Breakfast (Regular)	3,970,754	4,067,668	4,556,123	14.7%
Breakfast (Severe Need)	3,831,909	3,939,850	4,302,654	12.3%
Snacks (At Risk)	121,144	148,077	201,887	66.7%
Average Daily Attendance (ADA)	38,774	38,821	41,363	6.7%

Source: Texas Education Agency (TEA), Child Nutrition Programs District Profiles, 1999-2000 through 2001-02.

BISD participates in the National School Lunch Program (NSLP), School Breakfast Program (SBP), After School Snack and Summer Feeding programs administered by the Texas Education Agency (TEA). In September 1994, the district began operating under the Special Assistance Provision 2 universal feeding program. Provision 2 allows schools to take applications for free and reduced-price meals once every four years, rather than on the standard annual basis. This provision reduces the burden of paperwork on parents and on school districts by easing the requirements for taking applications, notifying the public and counting meals by category for any schools that agree to serve all enrolled students meals at no charge. School districts opting to adopt this standard and serve breakfast and lunch at no charge to their students must make up the difference between the current federal meals reimbursement and the actual cost of providing the meals.

In order to participate in Provision 2, the school district must submit a Provision 2 Amendment to the Policy Statement for Free and Reduced-Price meals. Under Provision 2, the district must agree to serve meals at no charge to all enrolled students regardless of income eligibility.

BISD has a high percentage of economically disadvantaged students. In 2001-02, 92.8 percent of its student population was classified as economically disadvantaged. Since the district is subject to Provision 2 reimbursement, the district must make up for any meals served to the remaining 7.2 percent of the students through its local revenue sources. **Exhibit 11-2** compares BISD against its peer districts in terms of the economically disadvantaged portion of students among the entire population. When compared against its peer districts, only Laredo ISD has a higher percentage of economically disadvantaged students

Exhibit 11-2
Economically Disadvantaged Students
Brownsville vs. Peer Districts
2001-02
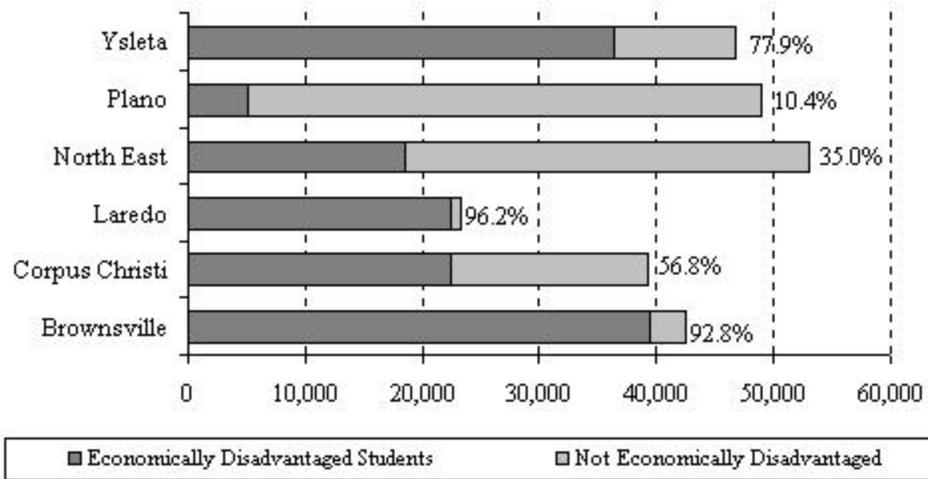
Source: TEA, Public Education Information Management System (PEIMS), 2001-02.

The Food Service Department receives its funding from a number of sources. Federal reimbursement dollars constitute the majority of the Food Services Department's revenue, comprising just over 92 percent of all revenue received. In addition to federal reimbursement dollars from the NSLP and SBP, BISD receives donated commodities from the USDA. The State of Texas provides slightly more than 1 percent of the total revenue received. Local sources, including the cost of adult meals, a la carte sales and special event catering, account for approximately 7 percent of the Food Service Department's revenue.

Exhibit 11-3 compares BISD to its peer districts in terms of federal revenue budgeted by each district's Food Service operation between 1997-98 and 2001-02. BISD receives significantly more federal dollars than its peer group. This is a reflection of the high number of students that are eligible to receive federally subsidized meals. As shown in **Exhibit 11-3**, there has been a 19.7 percent increase in federally budgeted funds since 1997-98 at BISD. Federal funding for the peer group has increased by an average of 19.3 percent over the same time period.

Exhibit 11-3
Food Service Budgeted Federal Revenue
BISD vs. Peer Districts
1997-98 through 2001-02

District	1997-98	1998-99	1999-2000	2000-01	2001-02	Percent

					Change From 1997-98 through 2001-02
Brownsville	**$15,358,521**	**$15,974,393**	**$15,838,151**	**$16,537,251**	**$18,381,857**	**19.7%**
Corpus Christi	$7,632,305	$8,088,000	$8,258,000	$8,015,000	$8,138,100	6.6%
Laredo	$6,231,000	$5,751,000	$6,603,330	$7,515,500	$7,621,000	22.3%
North East	$5,577,002	$6,320,785	$7,227,516	$6,922,271	$7,588,749	36.1%
Plano	$1,935,237	$2,006,085	$2,136,125	$2,365,282	$2,590,072	33.8%
Ysleta	$9,300,000	$10,572,000	$10,900,000	$11,144,872	$10,667,135	14.7%
Peer Average	**$6,135,109**	**$6,547,574**	**$7,024,994**	**$7,192,585**	**$7,321,011**	**19.3%**

Source: TEA, PEIMS, 1997-98 through 2001-02.

The BISD Food Service Department has operated at a profit over the last three years. During this period, the district has reinvested in renovations of school cafeterias. During 1998-99, the district renovated tile and floors in twenty elementary schools and one middle school. The floors in these cafeterias are now easier to maintain and are safer for cafeteria workers, students, faculty and parents. In 2001-02, the department renovated five high school and eight middle school cafeterias to enhance the eating environment for students. The Food Service Department also equipped five new schools during this period. **Exhibit 11-4** summarizes the actual revenue and expenditures from 1988-99 through 2000-01. During this period, revenues increased 23.6 percent while operating expenditures increased by 26.6 percent. Total expenditures increased by 38.2 percent. The capital outlay in 2001-02 caused the majority of the increase.

Exhibit 11-4
BISD Food Service Department
Actual Revenue and Expenditures
1998-99 through 2001-02

Revenue and Expenditure Categories	1998-99 Actual	1999-2000 Actual	2000-01 Actual	2001-02 Actual	Percent Change From 1998-99
Local	$1,285,794	$1,290,656	$1,281,357	$1,293,278	0.6%

State	$210,663	$222,549	$220,528	$184,392	(12.5%)
Federal	$15,065,673	$19,034,816	$16,906,346	$18,992,163	26.1%
Total Revenues	**$16,562,130**	**$20,548,021**	**$18,408,231**	**$20,469,833**	**23.6%**
Payroll	$6,959,099	$7,462,715	$8,157,618	$9,308,577	33.8%
Contracted Service	$605,312	$842,858	$1,080,034	$871,076	43.9%
Food and Supplies	$8,250,565	$7,862,297	$8,508,365	$9,761,828	18.3%
Other Operating Expenditures	$38,134	$35,278	$39,711	$127,119	233.3%
Total Operating Expenditures	**$15,853,110**	**$16,203,148**	**$17,785,728**	**$20,068,600**	**26.6%**
Operating Profit (Loss)	**$709,020**	**$4,344,873**	**$622,503**	**$401,233**	-
Capital Outlay	$1,286,747	$582,340	$853,339	$3,627,012	181.9%
Total Expenditures	**$17,139,857**	**$16,785,488**	**$18,639,067**	**$23,695,612**	**38.2%**
Net Profit/Loss	**($577,727)**	**$3,762,533**	**($230,836)**	**($3,225,779)**	-

Source: TEA, PEIMS, 1998-99 through 2000-01 and BISD Food Service Department, Statement of Revenue and Expenditures, 2001-02.

Payroll and food costs make up the majority of a district's food service annual expenditures. Often, the district has very little control over the price of food because of inflation. BISD participates in the Regional Educational Service Center I (Region 1) cooperative purchasing bid in an attempt to contain its overall food costs. The district also effectively uses commodities received from the USDA. The district reduced its labor costs by using convenience foods as much as possible in its meal preparation. Pre-packaged convenience foods do not require as much time to prepare as conventional, made-from-scratch menu items. The district uses disposable trays and cutlery and is installing power wash sinks at the schools to reduce the amount of clean-up time required following a meal.

Exhibit 11-5 illustrates the breakdown of expenditures by object code or category for 2001-02. Food costs comprise about 41 percent of the department's operating budget, exclusive of commodities. Payroll costs account for 39 percent of the department's operating budget. Non-food supplies include the disposable serving items used daily in the cafeterias and comprise six percent of the department's operating budget.

Exhibit 11-5
BISD Food Service Department
Breakdown of Expenditures
2001-02
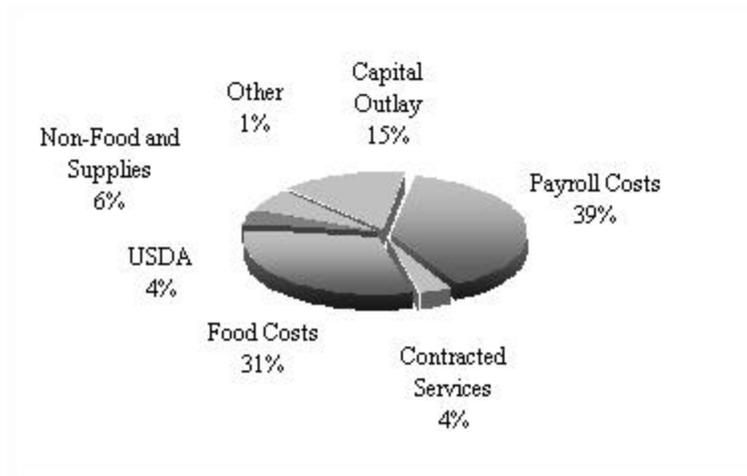
Source: BISD Food Service Department Statement of Revenues and Expenditures, 2001-02.

BISD installed computers at every campus and a wide-area-network (WAN) to connect all of the cafeterias' computers with the central office. The department uses an automated point-of-sale (POS) system from Computer System Design Inc., doing business as Systems Design. Each student either enters his/her identification number on the keypad or runs a card through the card reader, depending on the type of terminal in the cafeteria. The system enables the department to generate reports, track food service sales and collect student participation data. Additionally, the system monitors all students served each day and alerts the Food Service clerk if a student is coming through the line with a second meal. In such instances, the student must pay for the second meal.

The district uses Nutrikids for Windows to help plan menus. The system breaks down the nutritional value of each ingredient used in every menu item. This helps to ensure that the menu items served to students meet the USDA dietary requirements under the NSLP and SBP. The software also tracks the cost of each ingredient and provides recommended portion sizes of each menu item. This helps the district maintain control over food costs.

Chapter 11
FOOD SERVICE

A. ORGANIZATION AND MANAGEMENT (PART 1)

The administrator for Food Services has headed the department since 1985. The department employs 500 and has centralized control over each aspect of food service operations within its food service department, it is organized by functional area: Finance, Human Resources and Procurement. These functions are further segmented into Distribution/Warehouse, Information Technology, Nutrition, Marketing, Quality Assurance, Production/Catering and Facilities/Equipment Maintenance.The department employs seven registered dietitians. **Exhibit 11-6** depicts the 2002-03 Food Services Department's centralized organizational chart, which it updates annually.

Exhibit 11-6
BISD Food Service Department Organization
2002-03

Interim Superintendent
- Area 3 Superintendent
  - Administrator for Food Services
    - Administrator's Secretary
      - Administrative Staff Secretary
      - Receptionist/Secretary
      - Office Clerk
    - Information Technology Supervisor
      - Micro Computer Specialist I (2)
      - Application Specialist
      - Bookkeepers (4)
      - Payroll Clerk
      - Records Management Clerk
    - Area Supervisor Distribution -9 Managers-
      - Warehouse Supervisor
        - Inventory Clerk
        - Warehouse Specialist
        - Drivers (10)
        - Stockman (3)
        - Custodian
        - Mechanic
    - Area Supervisor Facilities/Equipment Management -10 Managers-
      - Institutional Equipment Supervisor
        - Technicians (2)
    - Area Supervisor Nutrition Education -9 Managers-
      - Manager Training Supervisors (3)
      - Personnel Clerk
      - Office Custodian
    - Area Supervisor Marketing -10 Managers-
      - Quality Assurance Specialist
      - Procurement Specialist
      - Junior Buyer
    - Area Supervisor Production/Catering -10 Managers-
      - Catering Driver

Source: BISD administrator for Food Services, September 2002.

Area supervisors from the central office oversee a cluster of schools. The cafeteria managers report directly to the area supervisor assigned to their cluster. Area supervisors ensure the cafeterias within their clusters comply with federal, state and local regulations and policies. Area supervisors visit each school within their clusters once per month. Most try to visit their cafeterias twice each month. At the end of each cafeteria visit, the area administrators complete a visitation report to document the visit and identify any areas where improvement could be made.

Each school cafeteria is staffed by a manager, a Food Service clerk, at least three Food Service workers and at least one custodian. Cafeteria managers make requisitions for food items three weeks in advance, take delivery of food items, schedule staff and manage the operations of the cafeterias. Food Service clerks perform cashiering duties and ensure that each student inputs his/her identification number into the POS terminal. Food Service clerks also track the inventory assigned each school. Food

Service workers prepare the food, work the food lines and clean the kitchen following meal periods. The custodians keep the cafeteria and surrounding area clean. **Exhibit 11-7** summarizes the current staffing at each campus cafeteria. The district employs 449 cafeteria workers.

Exhibit 11-7
BISD Food Service School Staffing
2001-02

School	Manager	FS Clerk	FS Worker	Custodian	Totals
A. A. Champion Elementary	1	1	4	1	7
A. X. Benavides Elementary	1	1	5	1	8
Bruce Aiken Elementary	0	1	4	2	7
Burns Elementary	1	1	8	2	12
Cameron Co J J A E P	1	0	2	0	3
Canales Elementary	1	1	6	1	9
Central Middle School	1	2	7	2	12
Clearwater Elementary*					0
Cromack Elementary	1	1	6	2	10
Cummings Middle School	1	1	5	1	8
Del Castillo Elementary	1	1	4	1	7
Dr. Americo Paredes Elementary	1	1	5	2	9
Dr. Ruben Gallegos Elementary	1	2	4	1	8
Egly Elementary	1	1	5	2	9
El Jardin Elementary	1	1	6	1	9
Faulk Middle School	1	1	8	1	11
Filemon B Vela Middle School	1	2	7	2	12
Garden Park Elementary	1	1	6	1	9
Garza Elementary	1	1	6	2	10

Gonzalez Elementary	1	1	6	2	10
Hanna High	1	1	14	2	18
Hubert R. Hudson Elementary	1	1	6	2	10
Josephine Castaneda Elementary	1	1	6	1	9
Lincoln Park Alt Ed	1	0	3	0	4
Longoria Elementary	1	1	3	1	6
Lopez High School	1	1	12	1	15
Mary and Frank Yturria Elementary	1	1	5	1	8
Morningside Elementary	1	1	7	1	10
Oliveira Middle School	1	1	8	2	12
Pace High School	1	2	14	0	17
Palm Grove Elementary	1	1	4	1	7
Perez Elementary	1	1	5	1	8
Perkins Middle School	1	1	9	1	12
Porter High School	1	2	11	1	15
Putegnat Elementary	1	1	4	1	7
R L Martin Elementary	1	1	5	1	8
Raul Besteiro Middle School	1	1	8	1	11
Resaca Elementary	1	1	2	1	5
Rivera High School	1	1	9	3	14
Russell Elementary	1	1	6	1	9
Sen. Eddie A. Lucio Jr. Middle School	1	0	7	2	10
Sharp Elementary	1	1	4	1	7
Skinner Elementary	1	1	4	1	7
Southmost Elementary	1	2	4	1	8
Stell Middle School	1	1	10	1	13
Vermillion Road	1	1	8	3	13

Elementary					
Victoria Heights Elementary	1	1	6	1	9
Villa Nueva Elementary	1	0	4	1	6
Total	**46**	**49**	**293**	**61**	**449**

Source: BISD administrator for Food Services, Department Position Control Report, September 2002.
* Clearwater Elementary and Central Middle School cafeterias are combined.

The central food warehouse, located just behind the administration building, provides the location for processing vendor deliveries. The inventory clerk receives the items and enters them into the inventory. The clerk refuses and returns any items that do not meet the specifications or quality guidelines established by the department. The clerk places the items on shelves until they are due to be delivered to the schools. All school deliveries come from the central food warehouse, with the exception of bread, milk and tortillas. These items are delivered just-in-time to the schools directly from the vendor. The central food warehouse stores approximately one-week worth of product. The department conducts a physical inventory at the end of each month.

The 1994 Texas School Performance Review (TSPR) noted that the BISD Food Service Department had been awarded numerous honors for its programs, and this continues to be the case. Since 1994, the BISD Food Service Department has been recognized throughout the nation for setting many best practice standards and procedures. The administrator for Food Services received the Food Service Achievement and Management Excellence award in 1999. The American School Food Service Association (ASFSA) named Hudson Elementary the State Nutrition Advisory Council School of the Year in 2001-02. The program has received a Best Practices Award from the USDA for creativity in menu planning and for innovative cafeteria practices.

FINDING

The BISD Food Service Department has developed a three-year strategic plan to assist it in meeting departmental goals and objectives. In November 2000, the department met for two half-day strategic planning sessions. These sessions identified the department's core purpose and developed a step-by-step road map that would lead it toward fulfilling that purpose. The department attempted to incorporate the goals of the district into its own strategic plan as well as the unique needs of the food service

function. The administrator for Food Services encouraged staff to participate fully in the planning session, by ensuring that the product of the planning session, the strategic plan, was something they could each buy into and support. Cafeteria managers contribute to setting the annual goals, while supervisors assess the strategic impact of these goals. Any changes are incorporated into the department's strategic plan. **Exhibit 11-8** details the vision statement for the department and the mission statements that arose from the department's strategic planning sessions.

Exhibit 11-8
BISD Food Service Department
Vision and Mission Statements

VISION
The Food Service Department provides attractive, safe and nutritionally sound meals to BISD customers in a cost-effective manner.
MISSION STATEMENTS
The Brownsville I.S.D. Food Service Department:

I.	Shall provide safe working conditions for all food service department personnel.
II.	Shall provide staff development and training for all food service department personnel.
III.	Shall practice financially sound methods in all of its transactions with effort to utilize program funds within the budget.
IV.	Shall provide students with high quality nutritious, appetizing and nourishing breakfast and lunch meals with menus being developed utilizing the U.S. Department of Agriculture, American Cancer Society and American Heart Association Dietary Guidelines: • Eat a variety of foods • Maintain ideal weight • Avoid too much fat, saturated fat and cholesterol • Eat foods with adequate starch and fiber • Avoid too much sugar • Avoid too much salt • Include more cruciferous vegetable on menu recipe • Offer foods high in vitamin A and C daily • Reduce number of times smoked items are on the cycle
V.	Shall provide every student with Nutrition Education to gain knowledge regarding the importance of good nutrition and proper food selections. It is

	the aim of the Food Service Department to aid students in developing life long healthy eating habits to improve overall well being: • Nutrition Education Resource library films, videos, books, pamphlets, etc. • Weekly and Monthly materials provided to students, parents, employees and administration • Provide for an annual Nutrition Education Plan
VI.	Shall encourage students, parents, teachers and community involvement in the school lunch and breakfast programs such as: • Kitchen tours • Tasting panels • PTA Meetings • Menu Committees
VII.	Shall introduce children to healthy eating habits during their formative years. Grades Pre-K through 1st shall be served all 5-food components of the school lunch to encourage consumption of a variety of foods.
VIII.	Shall provide Offer vs. Serve to students in 2nd-12th to reduce plate waste and encourage students to learn making healthy choices from menu items.
IX.	Shall provide children with special dietary needs, menu choices that are modified as necessary within school breakfast and lunch program guidelines.
X.	Shall strive to maintain positive inter- and intradepartmental communication.
XI.	Shall enforce and follow all TEA and USDA regulations regarding the school child nutrition programs.
XII	Shall support a policy for the school district that prohibits competitive foods sold during the breakfast and lunch periods.
XIII	Shall maintain a program for Quality Assurance. The Texas School Food Service Association of Standards of Excellence shall be used as a resource.

Source: BISD Food Service Department, Three-Year Strategic Plan.

The department surveyed Food Service employees, program administrators and students to evaluate how each group felt the department was performing. **Exhibit 11-9** presents the survey questions for each group.

**Exhibit 11-9
BISD Food Service Department
Department Evaluation - Survey Questions**

STUDENTS
• What have we been doing well that we need to continue? • What would make this a perfect cafeteria for our children? • What have we been doing that we need to improve? • What do we need to be doing that we have not done? • Other suggestions?

PROGRAM ADMINISTRATORS
• Describe your impression of the perfect school food service program for BISD children. • What are the three words you would use to describe the Food Service Department (FSD)? • Do you consider the FSD staff friendly? Helpful? • Have your department collaborations with the FSD been timely? Helpful? Successful? • Suggestions that would help us meet your expectations

FOOD SERVICE EMPLOYEES
• What have we been doing and doing well that we need to continue? • What would make this a perfect cafeteria for our children? • What have we been doing that we need to improve? • What do we need to be doing that we have not done? • Other suggestions

Source: BISD Administrator for Food Services.

The administrative staff reviewed the survey answers and addressed the major issues in the strategic plan. The department solicited input from its customer base and from its own employees then took action to formulate a plan to correct those areas within its control.

Each year the staff meets to evaluate its progress in meeting the mission statements laid out in the strategic plan and formulates an action plan for the next school year, in line with the long-term plan. The action plans contain seven goals and identify the objectives of each goal. The plan contains action steps to meet each goal and objective and requires a completion date so progress toward each goal can be easily tracked. The department identified seven goals for 2002-03:

- BISD Food Service will provide all customers appetizing, quality foods utilizing consistent standards;
- BISD Food Service will provide a school nutrition environment for the students, staff and community which fosters lifelong healthy eating habits and positively impacts the health of our children;
- BISD Food Service will provide a human resources department that will address employee recruitment and retention;
- BISD Food Service will provide and maintain safe and adequate food service facilities through implementation of a highly effective, well-staffed, comprehensive preventative maintenance program;
- BISD Food Service will increase participation in the child nutrition program;
- BISD Food Service will promote a friendly environment that supports professional behavior based on loyalty, integrity and mutual respect; and
- BISD Food Service will promote an environment that is conducive to innovation and changes that will meet the challenges of the future.

In some instances, a department goes through the exercise of strategic planning but fails to put in place the means to accomplish the plan. By contrast BISD Food Service Department has developed its plan and identified step-by-step processes that must be accomplished in order to meet its strategic plan. Department administrators have continued to modify departmental goals and objectives in line with current and future departmental needs. The department is in the final year of the 2000-01 three-year plan. The administrator for Food Services plans to bring staff back together to develop a new long-term plan when the current plan expires.

COMMENDATION

BISD Food Service adheres to its three-year strategic plan and annually develops an action plan that identifies departmental goals and objectives and provides the action steps required to meet each goal and objective.

FINDING

BISD Food Service strives to provide all employees opportunities for staff development and recognizes top performers each year. The assistant director of Human Resources has developed a staff development schedule for each employee class in the department to meet or exceed the district requirement for 18 hours of continuing education each year. Every August, Food Service employees attend in-service workshops where

administrators go over safety issues, departmental procedures, district policies, marketing programs, time management skills and job procedures. Prospective managers complete a comprehensive manager-training program running from October through April before they are given a school cafeteria to manage. The program provides the department with flexibility in the event that a manager must be out, because a trainee can step in. Hands-on experience is a key component of the training. There are currently five manager trainees in the department.

The department tries to promote cafeteria managers from within, providing an incentive to lower level employees to stay with the district. In 2001-02, Food Service instituted an incentive plan for cafeteria managers to be paid a stipend for receiving higher levels of certification through the TSFSA continuing education program. If an employee successfully completes certain levels, the employee is eligible to receive a stipend effective the beginning of the next school year. The stipends available are:

- Certification Level II: $100
- Certification Level III: $200
- Certification Level IV: $300

The cafeteria managers meet each month with administrators. During these meetings, staff discusses any issues that may have arisen since the last meeting. The administrators also take advantage of these meetings to provide some component of staff education. For example, safety procedures might be discussed at one meeting, and nutrition education at another. The administrator for Food Services makes a concerted effort to stay abreast of any changes in the industry and strives to keep staff thinking of innovative ways to improve the BISD Food Service program.

Each year an employee from each school, the warehouse and the administration office is selected by peers to be honored with the Heart of the Program Award. From the group, three employees, one from the schools, one from the warehouse and one from the office, are selected the Heart of the Program winners for the year. These three winners are sent to the next TSFSA conference.

COMMENDATION

The Food Service Department encourages and rewards staff development.

FINDING

Nutritional education is a key component of the BISD Food Service program. The district has dedicated an area supervisor to oversee this component. Although this individual supervises nine schools, one of his primary responsibilities is building a strong nutritional education program. Brownsville has a high incidence of diabetes in its population and the district believes that changing eating habits and educating children and parents about nutrition could help prevent the type of diabetes where diet is the contributing factor. BISD Food Services is also concerned with national childhood obesity epidemic and is taking steps to address these issues both in the classroom and with parents, with programs like nutrition intervention during National Diabetes Month and demonstrations in which low-fat versions of holiday foods were shared during Healthy Holiday Snacking Month.

The Food Services Department encourages school campuses to start a Nutrition Advisory Council (NAC). These school clubs bring students together to spread the word about how good nutrition and school food service programs contribute to a healthy lifestyle. NAC members represent their schools as student ambassadors to the Food Service Department. They are given the opportunity to learn about nutrition, give feedback about their school cafeteria and participate in quarterly taste-tests. The administrator for Food Services sends a memo to every principal at the beginning of the school year requesting that they start an NAC on their campus. The department provides an incentive for schools to be involved. In 2001-02, a raffle was held in which each student and the advisor of the winning school received a t-shirt with the Food Guide Pyramid logo. The American School Food Service Association (ASFSA) sponsors the program. By becoming a nationally chartered NAC, a school is allowed to compete for the NAC of the Year Contest, an honor bestowed on the best NAC in every state. BISD's Hudson Elementary received the honor in 2000-01.

The department makes its education programs inclusive and informative. The department circulates its nutritional education calendar at the beginning of each school year. The calendar includes an activity for every month. For example, in August 2002, the department ran a Name That Mascot Contest to name the superhero character the department has added to its program. During the on-site review, the tentative name for this character was Nutri-Man. The department puts on skits during certain promotional events, such as the National 5-A-Day week in September and Health Resolutions Month in January. In 2000-01 schools organized a canned food drive during the Hunger Awareness program. The department presents nutritional programs to the Parent-Teacher Associations throughout the district, often including recipes for low-fat treats, including low-fat oatmeal cookies.

Chapter 11
FOOD SERVICE

A. ORGANIZATION AND MANAGEMENT (PART 2)

COMMENDATION

The BISD Food Service Department provides nutritional education to all stakeholders.

FINDING

BISD Food Services Department is one of nine districts in the state that has attained the "Standard of Excellence" defined by the Texas School Food Service Association (TSFSA). The Standard of Excellence program consists of a three-part guide used for self-development or for recognition and accreditation of excellent school food service programs. The intent of the guide is to identify those school district food service programs that have completed all phases of the program, although each section maybe used independently. The three sections of the program are:

- *Section 1*: Consists of 10 standards with measurable criteria to identify a good school food service program.
- *Section 2*: Provides a self-study guide for use as a learning experience and to determine where a school food service operation is in relation to the standards.
- *Section 3*: Establishes procedures for an on-site Peer Review Team evaluation to determine the extent the standards have been met, to designate programs of excellence and to provide recognition of TSFSA programs of excellence.

The program encompasses the multifaceted segments of school food service programs in all the various sized districts in Texas. The criteria established by the TSFSA provide a yardstick to measure the effectiveness and efficiency of food service programs throughout the state. To date only nine Texas school districts have met and maintained the criteria, including BISD.

Exhibit 11-10 lists the nine Texas school districts that have attained the "Standard of Excellence."

Exhibit 11-10
Texas School Districts Attaining "Standard of Excellence"

District
Aldine Independent School District
Brownsville Independent School District
Cypress-Fairbanks Independent School District
Humble Independent School District
Klein Independent School District
Mansfield Independent School District
Montgomery Independent School District
Spring Branch Independent School District
Spring Independent School District

Source: Texas School Food Service Association Web site <http://www.tsfsa.org.

COMMENDATION

The BISD Food Services Department has met the TSFSA Standard of Excellence.

FINDING

BISD Food Service Department effectively uses technology to improve communication throughout the department and to improve efficiency. In 2001-02, the department installed a local area network to connect each of the school cafeterias to the central office, allowing food requisitions to be made on-line. Cafeteria managers e-mail their food orders to the procurement specialist three weeks in advance. If item counts change from one order to another, the procurement specialist e-mails that information to each cafeteria manager. For example, occasionally the count of hamburger patties contained in one box from the USDA may change from 102 to 240. The cafeteria managers must be made aware of these changes in order to effectively plan the food orders, thereby reducing the risk of spoilage or being short of a particular item.

Work order requisitions are sent to the area supervisor - Facilities/Equipment Management via e-mail. Once a work order has been received on-line, the area supervisor - Facilities/Equipment Management puts it on the schedule and notifies the cafeteria manager that the work order is in process. This has significantly reduced both the time and amount of paperwork previously required to complete a work order requisition.

Food Service staff has access to all departmental forms via the intranet set up by the Information Technology personnel in the department. There is an on-line department calendar as well as a suggestion box. The suggestion box provides employees with the opportunity to bring their suggestions directly to the attention of the administrator for Food Services. The system can protect the sender's identity if he/she desires anonymity. The Web site displays menus also.

COMMENDATION

Technology is used as an effective tool to improve communication between the campus cafeterias and Food Service administration, streamlining processes and increasing departmental efficiencies.

FINDING

The district includes Food Service management personnel in its pre-planning stages for new schools. The area supervisor Facilities/Equipment Management works with the selected architect to determine the cafeteria and kitchen layout. Enrollment projections and the type of school are taken into consideration when determining what type of equipment will be necessary. The area supervisor - Facilities/Equipment Management writes the specifications for ordering the new equipment. He reviews the blueprints to ensure that no unnecessary equipment has been included. The department estimates that this quality control practice has saved the district $50,000 per school by eliminating unneeded equipment.

COMMENDATION

The Food Services Department has saved the district new construction funds by verifying that equipment is necessary in new cafeteria facilities.

FINDING

BISD includes custodians in its MPLH calculation, causing the overall ratio to be out of line with recommended industry standards. MPLH is a standard performance measure of efficiency for school districts, hospitals, restaurants and other food service operations. It is calculated by dividing the number of meal equivalents served in a given period of time by the total labor hours worked during the same period to prepare the meals.

In order to calculate the MPLH, the meals being served by the district must be converted into meal equivalents. Industry analysts assume that each lunch served counts as a full meal equivalent. Breakfasts and a la carte items do not require the same degree of work as serving a full lunch

and are therefore reduced by some measure of equivalency. **Exhibit 11-11** shows the conversion rate for meal equivalents used by BISD and the review team to calculate MPLH. Some food service programs calculate one meal equivalent as three breakfasts. However, BISD uses two breakfasts as its equivalency standard.

Exhibit 11-11
Conversion Rate for BISD Meal Equivalents
2002-03

Category	Conversion Rate
Lunch Meals	One lunch equals one equivalent
Breakfast Meals	Two breakfasts equal one equivalent
A la Carte Sales	Sales divided by $2.00 equal one equivalent

Source: BISD administrator for Food Services, Calculating Hours for Cafeterias and Lunchrooms, Revised June 2002.

There are two systems of meal preparation, the conventional and the convenience systems. The conventional system involves using raw ingredients in the preparation of meals; the use of some bakery bread and prepared pizza; and involves washing dishes. In contrast, the convenience system maximizes the amount of processed foods and disposable wares. Although BISD primarily employs the convenience system, the review team used the industry standards associated with the conventional system, in evaluating the district's MPLH standards, as this is the most conservative approach.

Exhibit 11-12 outlines the MPLH industry standards used to evaluate staff productivity. If the MPLH rate is lower than the recommended rate, either the number of meals served is low or the number of hours worked is high. The number of hours worked is a function of two variables: the number of staff employed and the hours worked per worker. Both variables are controllable. For schools with MPLH below industry standards, a school food service operation would have to increase the number of meals served or reduce the number of staff or the hours worked by each employee to achieve the recommended MPLH.

Exhibit 11-12
Industry Standard Recommended Meals per Labor Hour

Number of Equivalents	Meals Per Labor Hour (MPLH)

	Conventional System		Convenience System	
	Low Productivity	High Productivity	Low Productivity	High Productivity
Up to 100	8	10	10	12
101 - 150	9	11	11	13
151 - 200	10-11	12	12	14
202 - 250	12	14	14	15
251 - 300	13	15	15	16
301 - 400	14	16	16	18
401 - 500	14	17	18	19
501 - 600	15	17	18	19
601 - 700	16	18	19	20
701 - 800	17	19	20	22
801 - 900	18	20	21	23
901 up	19	21	22	23

Source: School Food Service Management for the 21st Century, 5th Edition.

Between September 2001 and April 2002, BISD served an average 54,153 meal equivalents each day. Cafeteria workers worked 3,287 hours per day, which translates to an MPLH of 16.5. The target should be 19 MPLH according to the recommended industry standards for a conventional system. However, if the custodian hours are taken out of the equation, the average total hours worked by cafeteria workers per day is only 2,799. This raises the overall MPLH ratio to 19.5, which meets the industry standards. Few school districts include the custodians in their MPLH analysis

In reviewing the number of custodians in each cafeteria (**Exhibit 11-7**), there does not seem to be any standard establishing the proper number of custodians for each cafeteria. Industry best practices use a custodial standard of one custodian per every 20,000 square feet. Custodial assignments are not based on enrollment, as some schools that have two custodians have a lower number of students than those having only one custodian. For example, Bruce Aiken Elementary School has two custodians and an enrollment of 800 students, while El Jardin Elementary School has only one custodian with an enrollment of 951 students. There are a total of 61 custodians, 13.6 percent of the total cafeteria staff, at BISD to serve 48 schools.

Most cafeterias are less than 20,000 square feet, but usually one custodian is dedicated to each cafeteria since it is important that they be available immediately prior, during and immediately following serving time. These employees do not actually assist with providing the meals to the students. By including them in the MPLH analysis, the district's MPLH is not a representative estimate of the staffing costs of producing meals for its students.

Recommendation 88:

Exclude custodial hours from the MPLH calculation and develop a staffing standard for Food Service custodians.

By including the custodial hours in the MPLH calculation, BISD appears to be operating below recommended industry standards. Therefore, these hours should be excluded from the MPLH calculation so that the district can get an accurate measurement of its operating efficiencies consistent with industry practice.

The district should decrease the number of custodians in those cafeterias with more than one custodian. By reducing the number of custodians at each cafeteria, the department will improve its efficiency and reduce unnecessary labor costs. Currently custodians in the district work eight-hour shifts. It could be possible to reduce the number of hours offered to custodians in each cafeteria. This would keep the same staff in place but reduce the overall labor costs.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The administrator for Food Services develops an administrative policy to exclude custodial hours from the MPLH calculation.	March 2003
2.	The administrator for Food Services and the assistant director of Human Resources develop a staffing standard for Food Service custodians.	March 2003
3.	The administrator for Food Services and the assistant director of Finance identify which school cafeterias are overstaffed with custodians.	April 2003
4.	The assistant director of Finance works with cafeteria managers to determine the custodial needs of each cafeteria. The cafeteria managers make their staffing recommendations.	April - June 2003
5.	The administrator for Food Services presents the plan to the area administrator for review and comment.	June 2003
6.	The area administrator presents the plan to the superintendent and	July 2003

	the board for approval.	
7.	The administrator for Food Services and cafeteria managers implement the new staffing schedules.	August 2003

FISCAL IMPACT

By reducing the number of Food Service custodians to one per cafeteria, BISD would save $277,701 annually. This savings is based on the average custodian wage, pay grade MT-2, of $7.82 per hour (16 Food Service custodians x $7.82 per hour x 8 hours per day x 198 days = $198,190) + (a 12 percent variable fringe benefit rate) + fixed benefits (16 Food Service custodians x $3,483 = $55,728).

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Exclude custodial hours from the MPLH calculation and develop a staffing standard for Food Service custodians.	$277,701	$277,701	$277,701	$277,701	$277,701

FINDING

Although the Food Services Department is expected to be self-sufficient, the administrator for Food Services is not given the necessary flexibility and authority to manage staffing requirements to meet departmental goals. In the 2002-03 budget the administrator for Food Services requested that a position of Information Technology supervisor be created. A non-classified position has been responsible for supervising the department's computer specialists since 1996. This position ensures that the computer system is operational twenty-four hours a day, seven days a week. This employee developed computer modules that have greatly enhanced the food service system and improved the overall efficiency of the department. In addition, he files the district's claims for federal reimbursement each month and supervises two microcomputer specialists. The duties listed in his job description are consistent with an exempt position. However, the position and function only recently underwent a classification review that would establish whether or not it is an exempt level position as defined by the Fair Labor Standards Act. In the 2002-03 budget, administration approved the reclassification of the position. The district is currently developing the appropriate job description to transition this classified position to a certified (exempt) position.

The majority of BISD's Food Services Department's funding comes from the NSLP and the SBP. These federal funds must be used exclusively to

cover the costs associated with providing students daily meals. A food service program is intended to run independently within the district without additional funding from the general fund. This requires department management to have flexibility when making decisions intended to advance department goals and objectives. This flexibility extends to departmental staffing decisions. In the past, the administrator for Food Services input and recommendations regarding staffing and proper position classification has been overlooked by central administration, even though no additional funding from the general fund would have been needed

School districts that have an effective school Food Service program operate as a self-contained business unit within the district. Generally, the department has its own central office personnel that track food requisitions, financial performance, staffing requirements, preventative maintenance, food delivery, technology and participation rates. The district's central administration relies on the expertise of the Food Service administrators to staff their department effectively, as long as the funds are available to cover the cost of staffing without jeopardizing the quality of the meals provided to the students.

Recommendation 89:

Solicit Food Services management expertise and consider departmental goals and objectives when making key decisions that affect the department.

The Food Service program at BISD has been recognized as a national leader, clearly indicating that the department has been well managed. Given that the BISD Food Service program is not dependent on general fund dollars, it should be allowed to operate with a greater degree of autonomy.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	During the annual budget process, the administrator for Food Services reviews the departmental organization chart to determine if new positions are business-justified or if certain positions should be recommended for a change in classification and makes the necessary recommendation to the chief financial officer.	March 2003 and Annually thereafter
2.	The administrator for Food Services, the Budget administrator and chief financial officer review the Food Service budget to ensure that any salary impacts can be covered with operating funds and will not require additional fund balance.	June 2003 and Annually thereafter

3.	The Budget administrator reports back to the administrator for Food Services the status of staffing changes.	June 2003 and Annually thereafter

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

The department is not performing adequate preventative maintenance on food service equipment. Preventative maintenance programs are designed to increase the useful life of equipment with scheduled inspections, lubrication, part replacements and repair. A high-quality preventative maintenance program should anticipate maintenance needs and notify the appropriate personnel of required maintenance and repairs to equipment and machinery.

There are currently two Food Service equipment repair technicians and a supervisor handling all of the maintenance needs of the cafeterias. The district Maintenance Department technicians maintain everything outside of the kitchen. The Food Service equipment repair technicians are certified for maintaining refrigeration units and other specialized food service equipment, such as steam tables or oven units. Although the department has a preventative maintenance plan, the Food Service Equipment repair technicians perform preventative maintenance only when they are sent to fix a problem in one of the cafeterias.

One of the reasons cited for the lack of preventative maintenance was a lack of staff. The area supervisor - Facilities/Equipment Management told the review team that ideally it would take four equipment repair technicians to properly serve the district's cafeterias. The current level of staffing only allows the equipment repair technicians to "put out fires" and restore the equipment to function. When the Food Service equipment repair supervisor was promoted from a technician position, the difference in wages was not in line with the increase in responsibility for his level of experience.

Brownsville, with its close proximity to salt water from the Gulf of Mexico, has a problem with corrosion. The area supervisor - Facilities/Equipment Management estimates that corrosion cuts the useful life of the equipment by half. By properly caring for the existing equipment with regularly scheduled inspections, small problems can be corrected before they become more serious and more expensive problems to fix.

Although the district attempts to provide preventative maintenance, there is no written plan that actively tracks when preventative maintenance is scheduled at each school. There is no way to track what service has or has not been performed on the food service equipment at each school cafeteria.

San Angelo ISD (SAISD) plans maintenance projects over five years and keeps a database of the year's projects that are scheduled to be performed and the anticipated cost of the repair. The database tracks the following items:

- Name and serial number of equipment;
- Age of equipment;
- Location of equipment;
- Desired operating characteristics;
- Date of last preventative maintenance;
- Date of next scheduled preventative maintenance;
- Any malfunctions discovered;
- Corrective actions taken; and
- Record of replacement parts.

SAISD's five-year plan provides the district the opportunity to budget both time and funds five years into the future. It ensures that the district has available staff and supplies on hand to keep the equipment operating at maximum performance levels. In addition, SAISD implemented a forward maintenance crew that visits each school at least once per year and performs preventative maintenance and low priority work orders.

Recommendation 90:

Prepare a five-year preventative maintenance plan for food service equipment and staff accordingly.

A database should be set up to track the scheduled dates preventative maintenance is to take place to ensure that all food service equipment is properly maintained. The benefits of such a program should include reduced downtime for critical systems and equipment, extended life for facilities and equipment, improved equipment reliability and an improved overall appearance in the facilities, but will require hiring of an additional full-time employee.

An additional Food Service equipment repair technician would better distribute the workload allowing the district to focus on preventative maintenance. Cafeteria managers should be trained to perform the minor preventative maintenance, such as lubrication and proper cleaning techniques that will prolong the life of the equipment.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The area supervisor, Facilities/Equipment Management, develops a five-year preventative maintenance program for food service equipment throughout the district including detailed instructions for each major piece of food service equipment.	March - April 2003
2.	The area supervisor, Facilities/Equipment Management, requests that an additional equipment repair technician position be created in the Food Service Department.	April 2003
3.	The area supervisor, Facilities/Equipment Management requests that the pay grades for the equipment repair supervisor and technicians be raised one pay grade.	April 2003
4.	The administrator for Food Services approves the new position and increase in wage structure and posts the position through Human Resources.	May 2003
5.	The area supervisor, Facilities/Equipment Management, interviews candidates and makes a selection recommendation to the administrator for Food Services.	June 2003
6.	The Food Services Department hires an additional maintenance technician.	July 2003
7.	The area supervisor, Facilities/Equipment Management, and the administrator for Food Services establish a program to evaluate the results of this program by analyzing equipment failure reports, number of preventative work orders performed in comparison to the overall and actual hours spent on preventative versus normal maintenance.	July - August 2003
8.	The area supervisor, Facilities/Equipment Management, implements the preventative maintenance plan.	August 2003
9.	The area supervisor, Facilities/Equipment Management, evaluates the preventative maintenance and reports the status to the administrator for Food Services.	October 2003 and Quarterly Thereafter

FISCAL IMPACT

Currently, the Food Service Equipment repair technicians are classified as pay grade MT-6 and the supervisor is classified as a pay grade MT-7. It would cost the district $15,389 annually to raise the positions by one pay grade to MT-7 and MT-8, respectively ($11.60 per hour - $9.40 per hour x 2 technicians x 8 hours per day x 245 days per year) + ($12.86 per hour -

$10.25 per hour x 1 supervisor x 8 hours per day x 245 days per year) + (12 percent variable benefit rate).

Additionally, this recommendation would require that an additional equipment repair technician be hired. The cost of hiring this position, at a pay grade MT-7 would be $28,947 annually ($11.60 per hour x 8 hours per day x 245 days per year) + (12 percent variable benefit rate) + ($3,483 fixed benefit).

The total annual cost of implementing this recommendation would be $44,335.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Prepare a five-year preventative maintenance plan for food service equipment and staff accordingly.	($44,336)	($44,336)	($44,336)	($44,336)	($44,336)

Chapter 11
FOOD SERVICE

B. MEAL PARTICIPATION (PART 1)

School districts that take part in the federal lunch program receive cash subsidiaries and donated commodities from the USDA for each meal they serve. In return, the district must serve its students meals that meet federal requirements for nutritional value and offer free or reduced-price meals to eligible students. BISD receives its federal reimbursement under the Provision II system; all students regardless of economic eligibility are provided breakfast and lunch at no charge. There are a high percentage of economically disadvantaged students in BISD. As in most school districts, BISD has a higher percentage of students participating in lunch than in breakfast, even though both meals are served at no charge. **Exhibit 11-13** presents the 2002-03 reimbursement rates BISD receives from the federal government in relation to the NSLP and SBP.

Exhibit 11-13
Reimbursement Rates
2001-02

District	Full Price	Reduced-Price	Free
Reimbursable Lunches	$0.22	$1.76	$2.16
Reimbursable Breakfasts	$0.22	$0.87	$1.17
Breakfast Severe Needs (additional)		$0.23	$0.23
After School Snack	$0.05	$0.29	$0.58

Source: Child Nutrition News, August 2002.

All of the district's elementary and middle school campuses are closed, meaning that students are not allowed off school property once classes begin for the day. Two high schools, Lopez and Rivera, have closed campuses. The remaining three high schools, Pace, Porter and Hanna, are open campuses, where students are allowed to leave the campus grounds during the lunch period. Campus administration at BISD makes the determination whether or not to close the campuses. **Exhibit 11-14** compares meal participation between 1999-2000 and 2001-02 for BISD and its peer districts. BISD increased its participation rate in the breakfast program by 8.7 percent during this period. The district led its peers each year for breakfast participation, averaging 56.2 percent over the three-year period. Lunch participation decreased 5.6 percent, averaging 82.5 percent

between 1999-2000 and 2001-02. However, when compared to its peers, BISD averaged much higher lunch participation.

The only exception was in 2001-02, when Laredo was slightly above BISD at 82.1 percent, compared to BISD's rate of 81.4 percent.

Exhibit 11-14
Average Annual Meal Participation Rates
BISD vs. Peer Districts
1999-2000 through 2001-02

District	Brownsville	Corpus Christi	Laredo	North East	Plano	Ysleta
Breakfast Participation Rates						
1999-2000	**54.9%**	15.8%	25.6%	16.3%	7.3%	21.0%
2000-01	**54.0%**	16.2%	36.1%	15.3%	8.0%	23.2%
2001-02	**59.7%**	16.2%	39.4%	15.1%	7.7%	20.5%
Percent Change (1999-2002)	**8.7%**	2.5%	53.9%	(7.4%)	5.5%	(2.4%)
Lunch Participation Rates						
1999-2000	**86.2%**	67.2%	77.0%	47.1%	37.5%	64.1%
2000-01	**80.0%**	67.8%	79.2%	51.4%	38.3%	67.6%
2001-02	**81.4%**	69.1%	82.1%	51.1%	37.4%	65.2%
Percent Change (1999-2002)	**(5.6%)**	2.8%	6.6%	8.5%	(0.3%)	1.7%

Source: TEA, Child Nutrition Programs District Profile Reports for BISD and peer districts, 1999-2000, 2000-01, and 2001-02.

Exhibit 11-15 compares BISD's lunch participation rates by school for the months of October 1999, October 2000 and October 2001. At 94.7 percent, the elementary schools have the highest average participation rates as compared to the middle schools and high schools. The participation at the elementary school level remained fairly stable with only a one percent increase over the three-year comparison period. Middle schools' average lunch participation was 87.3 percent. Participation dropped slightly in October 2001 as compared with October 1999. Finally, the average lunch participation rate at the high schools was 62.3 percent.

Lunch participation at the high school dropped off eight percent for October 2001 as compared to October 1999.

Exhibit 11-15
BISD Lunch Participation Rates by School
October 1999 through October 2001

School	October 1999 Lunch Participation Rate	October 2000 Lunch Participation Rate	October 2001 Lunch Participation Rate	Percent Change
Bruce Aiken Elementary	94%	96%	95%	1%
Burns Elementary	94%	95%	123%	31%
Canales Elementary	95%	94%	97%	2%
Clearwater Elementary	96%	96%	91%	(5%)
Cromack Elementary	97%	95%	95%	(2%)
Egly Elementary	94%	91%	92%	(2%)
El Jardin Elementary	95%	95%	95%	0%
Filemon B Vela Middle School	94%	89%	88%	(6%)
Garden Park Elementary	95%	95%	96%	1%
Garza Elementary	96%	96%	96%	0%
Gonzalez Elementary	93%	96%	95%	2%
Del Castillo Elementary	97%	96%	96%	(1%)
Hubert R Hudson Elementary	92%	90%	107%	16%
Josephine Castaneda Elementary	96%	94%	93%	(3%)
Longoria Elementary	97%	97%	94%	(3%)
Mary and Frank Yturria Elementary	92%	93%	93%	1%
Morningside Elementary	95%	95%	95%	0%
Palm Grove Elementary	97%	97%	95%	(2%)
Perez Elementary	95%	94%	93%	(2%)

Putegnat Elementary	96%	97%	96%	0%
R L Martin Elementary	94%	94%	97%	3%
Resaca Elementary	94%	97%	97%	3%
Russell Elementary	92%	92%	91%	(1%)
Sharp Elementary	93%	93%	94%	1%
Skinner Elementary	96%	95%	96%	0%
Southmost Elementary	96%	96%	96%	0%
Vermillion Road Elementary	97%	97%	97%	0%
Victoria Heights Elementary	95%	96%	96%	1%
Villa Nueva Elementary	92%	95%	92%	0%
Average Participation (Elementary)	**95%**	**95%**	**96%**	**1%**
Central Middle School	78%	77%	72%	(8%)
Cummings Middle School	91%	90%	89%	(2%)
Faulk Middle School	91%	90%	89%	(2%)
Oliveira Middle School	78%	74%	79%	1%
Perkins Middle School	97%	95%	90%	(7%)
Raul Besteiro Middle School	92%	95%	92%	0%
Sen. Eddie A Lucio Jr. Middle School	93%	96%	96%	3%
Stell Middle School	86%	89%	84%	(2%)
Average Participation (Middle School)	**88%**	**88%**	**86%**	**(2%)**
Hanna High School	51%	45%	40%	(22%)
Pace High School	76%	60%	52%	(32%)
Porter High School	67%	60%	56%	(16%)
Lopez High School	76%	67%	69%	(9%)
Rivera High School	77%	73%	67%	(13%)

Average Participation (High School)	**69%**	**61%**	**57%**	**(17%)**
Lincoln Park Alt Ed	70%	66%	78%	11%
Teen Leaning Center	90%	67%	91%	1%
Average Participation (Alternative Ed)	**80%**	**67%**	**85%**	**6%**

Source: BISD Food Service Department School Lunch and Breakfast Participation Reports, October 1999, October 2000 and October 2001.

Exhibit 11-16 compares BISD's breakfast participation rates by school for the months of October 1999, October 2000 and October 2001. The elementary schools have the highest average participation rates as compared to the middle schools and high schools, at 59.3 percent. The participation at the elementary schools increased 24 percentage points in October 2001 as compared to October 1999. Middle schools' average breakfast participation rates increased 19 percentage points, with an average participation rate of 45.7 percent. The average breakfast participation at the high schools was 56.3 percent. This reflects a participation rate 10 percentage points below the October 1999 participation rate.

Exhibit 11-16
BISD Breakfast Participation Rates by School
October 1999 through October 2001

School	October 1999 Breakfast Participation Rate	October 2000 Breakfast Participation Rate	October 2001 Breakfast Participation Rate	Percent Change
Bruce Aiken Elementary	52%	52%	46%	(12%)
Burns Elementary	41%	48%	78%	90%
Canales Elementary	65%	74%	96%	48%
Clearwater Elementary	29%	28%	33%	14%
Cromack Elementary	85%	89%	94%	11%
Egly Elementary	45%	37%	40%	(11%)
El Jardin Elementary	51%	47%	49%	(4%)

Filemon B Vela Middle School	32%	32%	33%	3%
Garden Park Elementary	52%	60%	64%	23%
Garza Elementary	34%	88%	58%	71%
Gonzalez Elementary	38%	45%	47%	24%
Del Castillo Elementary	51%	85%	89%	75%
Hubert R Hudson Elementary	41%	44%	64%	56%
Josephine Castaneda Elementary	49%	57%	59%	20%
Longoria Elementary	72%	69%	68%	(6%)
Mary and Frank Yturria Elementary	62%	56%	55%	(11%)
Morningside Elementary	89%	85%	97%	9%
Palm Grove Elementary	61%	58%	57%	(7%)
Perez Elementary	92%	95%	94%	2%
Putegnat Elementary	44%	53%	60%	36%
R L Martin Elementary	38%	50%	89%	134%
Resaca Elementary	42%	46%	42%	0%
Russell Elementary	31%	36%	41%	32%
Sharp Elementary	41%	50%	52%	27%
Skinner Elementary	45%	51%	57%	27%
Southmost Elementary	88%	89%	89%	1%
Vermillion Road Elementary	90%	91%	92%	2%
Victoria Heights Elementary	45%	65%	74%	64%
Villa Nueva Elementary	62%	64%	61%	(2%)
Average Participation (Elementary)	**54%**	**60%**	**64%**	**19%**
Central Middle School	28%	24%	28%	0%
Cummings Middle School	37%	33%	35%	(5%)

Faulk Middle School	42%	43%	42%	0%
Oliveira Middle School	86%	84%	87%	1%
Perkins Middle School	39%	44%	40%	3%
Raul Besteiro Middle School	41%	41%	38%	(7%)
Sen. Eddie A Lucio Jr. Middle School	39%	39%	87%	123%
Stell Middle School	33%	36%	41%	24%
Average Participation (Middle School)	**43%**	**43%**	**50%**	**19%**
Hanna High School	31%	36%	31%	0%
Pace High School	92%	89%	52%	(43%)
Porter High School	94%	88%	83%	(12%)
Lopez High School	45%	44%	47%	4%
Rivera High School	37%	37%	37%	0%
Average Participation (High School)	**60%**	**59%**	**50%**	**(10%)**
Lincoln Park Alt Ed	62%	59%	58%	(6%)
Teen Learning Center	92%	70%	90%	(2%)
Average Participation (Alternative Ed)	**77%**	**65%**	**74%**	**(4%)**

Source: BISD Food Service Department School Lunch and Breakfast Participation Reports, October 1999, October 2000 and October 2001.

The review team surveyed parents, teachers, principals and students to ask their opinion about the food service operation at BISD. Overall, the responses were positive. The majority of parents, teachers and principals agreed or strongly agreed that the cafeteria's food looks and tastes good. A fairly large percentage of students surveyed had no opinion. The question pertaining to whether or not the food was served warm received a favorable response from all groups surveyed. **Exhibit 11-17** summarizes the survey responses to these two questions.

Exhibit 11-17
Food Service Survey Results

Survey Statement	Survey Response			
	Strongly Agree/Agree	No Opinion	Disagree/Strongly Disagree	No Response
The cafeteria's food looks and tastes good.				
Students	25.2%	22.0%	48.7%	4.0%
Teachers	53.2%	7.6%	38.6%	0.6%
Parents	56.8%	14.5%	27.1%	1.4%
Principals and Asst. Principals	60.9%	8.7%	30.4%	0.0%

Exhibit 11-17
Food Service Survey Results

Survey Statement	Survey Response			
	Strongly Agree/Agree	No Opinion	Disagree/Strongly Disagree	No Response
Food is served warm.				
Students	45.8%	21.4%	28.6%	4.2%
Teachers	79.2%	1.9%	18.4%	0.6%
Parents	69.6%	11.2%	17.4%	1.8%
Principals and Asst. Principals	91.3%	0.0%	8.7%	0.0%

Source: BISD TSPR Survey Responses, September 2002.

Note: While these surveys were not scientifically administered, in a random sampling of 618 students, 550 teachers, 2,000 parents and 90 principals and assistant principals that were surveyed, 618 students, 158 teachers, 276 parents and 23 principals and assistant principals responded. The results are included here to show the general opinion of those responding.

Chapter 11
FOOD SERVICE

B. MEAL PARTICIPATION (PART 2)

FINDING

The district has taken innovative steps in order to increase participation in both lunch and breakfast programs. In 1998-99, the district renovated the flooring in 20 elementary schools and one middle school at a cost of $125,693. In 2001-02, BISD spent $2.6 million to renovate the interiors of all high schools and all but one middle school, including:

- New booth seating;
- High school memorabilia boxes containing items unique to each school;
- New fiberglass tables in the court yard;
- Interior design coordinated with school mascot; and
- Jukeboxes.

These improvements were put in place as a means to make the cafeteria a more appealing place to eat and socialize with school friends.

The elementary cafeterias are on a three-week cycle. The menus are bright and colorful, and the elementary cafeterias are regularly decorated with some special theme throughout the year. For example, the review team was in the district during the National 5-a-Day program, and some cafeterias were decorated with fruits and vegetables. During the monthly cafeteria manager meetings, the area supervisor for Marketing discusses the theme for the following month. Cafeteria managers are encouraged to provide input and feedback as to what kind of decorations they believe will have the most positive impact on the students.

Middle and high school cafeterias have been fashioned after a food court operation. There are five stations set up; Country Kitchen, The Grille, Mexican Food, Nachos and Frito Pie and Pizzeria. The menu choices at each station are changed daily, although a student can get a hamburger or cheese burger any day of the week from the Grille. In addition to the five food courts, the district operates a deli shop on each campus where assorted salads and submarine sandwiches are served. There is also a light platter available with cottage cheese, fruit and salad.

Throughout the year, the district surveys students to determine what menu items they like best. When considering a new menu item, the district has a taste testing to gauge student response. The Menu Planning Committee

carefully reviews the survey responses and decides whether to incorporate the item into the menu. Once the committee adds an item to the menu, the committee tracks its reception by the student body. If the item is not popular, the committee will remove it from the menu. While the review team was on-site, the Menu Planning Committee met to evaluate the menu and determine what, if any, items should be discontinued. BISD students did not like celery and carrot sticks, a new menu item for the 2002-03 school year, so the committee decided to discontinue item immediately and prevent future food waste.

Finally, the district established a marketing plan as a means to increase meal participation. The area supervisor for Marketing educates cafeteria workers that the appearance of the food is as important as its taste. The district experiments with different garnishes to make the serving lines appear more attractive. The student derives the first impression of a menu item from its appearance. If the district improves the overall appearance of the food, students will be more likely to put it on their trays.

COMMENDATION

BISD employs and continually seeks innovative strategies designed to improve meal participation.

FINDING

Students and parents complain that there is not adequate time for the students to eat lunch at the open campus high schools. Each of these schools has one lunch period to serve nearly 2,000 students. The two closed high school campuses, Lopez and Rivera, have two lunch periods. **Exhibit 11-18** presents the lunch periods for each high school. The lunch periods at the open campuses are 45 minutes. It is difficult for the cafeterias to serve this volume of students in this period of time.

Exhibit 11-18
BISD High School Lunch Periods

	Begin	End
Hanna High School	11:30	12:40
Pace High School	1:40	2:25
Porter High School	12:05	12:50
Lopez High School (2 periods)	12:18	2:24
Rivera High School (2 periods)	12:05	2:15

The review team witnessed lunch periods at Hanna and Pace High Schools. Both cafeterias were overcrowded, and students had to stand in long lines before getting served. Some students spent 30-40 minutes of their lunch period in line, leaving them with little time remaining to eat lunch. Because of the long waiting period, many students decided to eat from vending machines, eat off campus or purchase food from school and/or student organization food sales, taking with them federal reimbursement dollars that cannot be claimed by the district.

Exhibit 11-19 compares the average participation rates at the district's five high schools. In comparing the participation rates at the closed campuses versus the open campuses, there is a significant difference in participation. Hanna High School has the lowest participation rate of all three open campuses at 45 percent. The closed campuses average 71.5 percent participation in their school meal programs with two lunch periods.

Exhibit 11-19
Average Lunch Participation Rates
BISD High Schools
2001-02

School	Open/Closed Campus	Average Participation Rate
Hanna High School	Open	45%
Pace High School	Open	63%
Porter High School	Open	61%
Lopez High School	Closed	71%
Rivera High School	Closed	72%

There are a number of ways that districts address low meal participation in their cafeterias. Some districts close their campuses for the entire school day. Other districts have increased the number of lunch periods and staggered the serving times. Staggered lunch periods improve the flow of students through serving lines, allow kitchen workers time to restock food lines, reduce cafeteria noise and confusion and improve oversight and security during lunch periods. Each of these actions have been known to improve participation rates.

Recommendation 91:

Institute two lunch periods at all high schools.

Currently, there is not enough time for students to eat at the open campus high schools. The problem, could be resolved if the district schedules two lunch periods at every high school. It is unreasonable to attempt to serve an average of 2,000 students in 45 minutes. By limiting the lunch periods, the district is encouraging its students to go elsewhere, reducing participation rates and risking student nutrition.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The administrator for Food Services meets with the high school administrators and cafeteria managers to discuss the logistics of expanding lunch serving times to two periods.	March - May 2003
2.	The administrator for Food Services meets with high school cafeteria manages to plan and staff the additional period.	May 2003
3.	The administrators make the necessary changes to the block scheduling to include two lunch periods at each high school.	June - July 2003
4.	The district institutes two lunch periods at all high schools.	August 2003

FISCAL IMPACT

If the district expands its lunch periods at all high schools, in 2003-04, it should see an immediate increase in participation and therefore federal revenue. It is assumed that the open high school campuses will reach the same participation rates currently seen in the closed high schools that currently have two lunch periods, 71.5 percent by the end of the fourth full year of implementation.

Exhibit 11-20 shows the incremental revenue that will be realized by the increase in participation at each school, based on current enrollment numbers using the reduced-price reimbursement rate, $1.71 per meal, which will yield a conservative estimate of revenue. For example, Hanna High School had an average participation rate of 44 percent in 2001-02, the incremental revenue that would be realized if participation rose to 53 percent would be $74,396 (2,613 students) x (53 percent - 44 percent) x ($1.71 per meal served) x 185 days in the school year). The calculation methodology would be the same for subsequent years and for the other high schools. There would be no incremental revenue realized in the first year.

Exhibit 11-20
Incremental Revenue
Closed High School Campuses at Lunch

	Hanna High School			Pace High School			Porter High School			Total
Year	ADA	Percentage	Revenue	ADA	Percentage	Revenue	ADA	Percentage	Revenue	Revenue
2003-04	2,613	44%	$0	1,952	55%	$0	1,870	61%	$0	$0
2004-05	2,613	53%	$74,396	1,952	58%	$18,525	1,870	63%	$11,831	$104,752
2005-06	2,613	60%	$132,260	1,952	63%	$49,401	1,870	65%	$23,663	$205,324
2006-07	2,613	71.5%	$227,321	1,952	71.5%	$101,890	1,870	71.5%	$62,115	$391,327
2007-08	2,613	71.5%	$227,321	1,952	71.5%	$101,890	1,870	71.5%	$62,115	$391,327

Source: BISD Meal Participation Reports 2001-02.

The increased participation levels will require additional staffing. Assuming that the additional labor will be Food Service workers that will be paid $7.82 per hour (pay grade MT-2) based on the district operating at 19.0 MPLH and that food costs comprise 40 percent of revenue, **Exhibit 11-21** sets out the total savings the district would realize upon implementing this recommendation.

Exhibit 11-21
Net Savings

Year	Incremental Revenue	Food Costs	Labor Costs	Net Savings
2003-04	$0	$0	$0	$0
2004-05	$104,752	$41,901	$29,812	$33,039
2005-06	$205,324	$82,130	$59,623	$63,571
2006-07	$391,326	$156,530	$93,694	$141,102
2007-08	$391,326	$156,530	$93,694	$141,102

Source: TSPR.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Institute two lunch periods at all high schools.	$0	$33,039	$63,571	$141,102	$141,102

FINDING

Student organization concession sales are driving down meal participation. One of the school's major sources of income for student organizations is concession sales. However, providing food that does not meet the nutritional standards as set out by the USDA during the specified meal times, puts the district at risk of losing its NSLP and SBP funding. A la carte items are one of a few ways a Provision 2 district can finance the meals served to students that would not be eligible for a free or reduced-price meal in a non-Provision 2 program.

One middle school visited by the review team has a snack bar set up just outside the cafeteria. Food sales from this snack bar are a major source of revenue for the student clubs. A Hanna High School club was selling ice cream bars and other treats just outside the cafeteria during the lunch period. There is no school board policy that restricts any foods sold in competition with the Food Service Department from being sold during meal service. While this practice does not violate existing laws it does provide students access to foods of minimal nutritional value (FMNV).

In addition, federal regulations prohibit the sale of FMNV in the food service area during meal periods. FMNV include carbonated beverages; water ices that do not include fruit or fruit juices; chewing gum; and candies made predominantly from sweeteners such as hard candies like lollipops, mints and jaw breakers, jellies and gums such as jelly beans, marshmallow candies, fondant, licorice, spun candy and candy coated popcorn.

In April 2002, TEA distributed a FMNV policy change based on the USDA's January 2001 policy memorandum that reinforced the requirements prohibiting FMNV and established financial penalties for schools that violate FMNV restrictions. The USDA recommends that corrective action be taken against schools in violation of the FMNV policy, including not allowing reimbursement for all meals served on the day the violation was observed and that lost income be recovered from a source other than food service.

Many school districts establish policies and procedures to restrict the sale of foods in competition with meals served under the NSLP and SBP. Because vending machines and concession sales are fundraisers for a number of school organizations, many schools do not eliminate the practice, but restrict it during lunch periods. Bastrop ISD established a district policy to control the sales of foods in competition with meals served by the school cafeterias. The district implemented procedures where all vending machine companies had to work with the Food Services Department. One school district in California has recently banned all

vending machines from all schools to ensure that its students did not have access to FMNV.

Recommendation 92:

Adopt board policy that restricts vending operations and concessions during any of the meal periods.

The administrator for Food Services should work with principals and school sponsors to develop and implement policies that restrict the sale of outside food items during the meal periods at all schools. Any vending machines that are still located in sight of the cafeterias should be turned off during meal times. The district might consider allowing student organizations to sell during the last five minutes of the lunch period and after school.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The administrator for Food Services meets with the school administrators to discuss why the policy is necessary and reaches a consensus as to when and under what circumstances outside food items can be sold by student organizations.	April 2003
2.	The administrator for Food Services drafts an agenda item for the next board meeting and presents it to the superintendent for review and any necessary revisions.	May 2003
3.	The superintendent presents the agenda item at the board meeting.	June 2003
4.	The board adopts the policy restricting outside food sales during meal serving times.	June 2003
5.	The principals and administrator for Food Services implement the policy.	August 2003

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

Although the Breakfast-in-a-Bag program has successfully increased breakfast participation at the schools operating the program, less than half of the schools have adopted the program. Currently, 18 schools provide Breakfast-in-a-Bag to their students. The Breakfast-in-a-Bag program brings breakfast directly to the classroom. A teacher's aide or teacher picks

up the breakfasts from the cafeteria and takes them to the classroom. Students eat their breakfast during the morning announcements.

The average participation rate for schools that serve Breakfast-in-a-Bag is 82 percent districtwide versus a 49 percent participation rate in schools not electing to serve Breakfast-in-a-Bag. In many of the district's elementary schools, breakfast participation is above 90 percent when serving Breakfast-in-a-Bag. Only two middle schools serve students Breakfast-in-a-Bag, and they average 87 percent participation in the program. Pace and Porter High Schools participate in the program, with an average participation rate of 68 percent, as compared to the three other high schools not offering the program that average a 38 percent participation rate in breakfast.

According to TSFSA, studies from across the nation and from school districts that have piloted similar programs to Breakfast-in-a-Bag have identified the following educational benefits that can be expected from increased participation in the School Breakfast Program:

- Increased school attendance;
- Increased student attention;
- Improved student behavior;
- Decreased drop out rates;
- Reduced disciplinary referrals;
- Increased parental and community involvement;
- Reduced tardiness; and
- Measurably improved test scores.

Breakfast served under the SBP guidelines provides 25 percent of a student's daily nutritional needs. Students eating both breakfast and lunch at school receive 60 percent of their daily nutritional needs. Since sound nutrition is a basic building block of good health, students in school districts that act to increase participation in breakfast programs have received the following health benefits:

- Reduced visits to the nurse;
- Increased attention to sound nutrition at home;
- Reduced absences due to headache or stomach ache;
- Improved overall health; and
- Decreased absences due to illness.

Recommendation 93:

Expand the Breakfast-in-a-Bag program to every school in the district.

Many school districts in Texas have become conscious of the importance of providing breakfast to their children. The 1994 TSPR review recommended that the district strive to expand its Breakfast-in-a-Bag program, commending its success at that time. The results of the program to date have been very impressive. There is a tremendous difference in the level of breakfast participation in the schools opting to run the program. It is often difficult for parents to provide breakfast to their children before school. Another factor that often reduces breakfast participation is the bus schedule. Often students are not dropped off early enough to go through the serving line before the start of class. Breakfast-in-a-Bag resolves each of these issues. BISD should adopt the program at every school to ensure that every student in the district has the opportunity to participate in breakfast and derive the economic, academic and health benefits associated with a eating a nutritious breakfast.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The administrator for Food Services meets with the campus administrators and cafeteria managers of the schools not yet offering Breakfast-in-a-Bag and presents information on the program and the impact of adopting the program.	March - May 2003
2.	The administrator for Food Services drafts an agenda item for the next board meeting and presents it to the superintendent for review and any necessary revisions.	May 2003
3.	The superintendent presents the agenda item at the board meeting.	June 2003
4.	The board adopts the policy requiring Breakfast-in-a-Bag at all schools.	June 2003
5.	The principals prepare and distribute a letter to be sent to all parents explaining that Breakfast-in-a-Bag will be available to their children when they return in the next school year.	July 2003
6.	The district begins implementing the new policy.	August 2003

FISCAL IMPACT

- If the district can increase average breakfast participation to 70 percent districtwide in
  2003-04, 73 percent in 2004-05, 77 percent in 2005-06 and 80 percent in 2006-07 and 2007-08, the district will increase federal reimbursements by $669,977 in 2003-04 (42,541 enrolled students x 95 percent attendance rate) x (70 percent participation) x ($0.87 reduced-price reimbursement rate) x (185 school days) minus

(42,541 enrolled students x 95 percent attendance rate) x (59.7 percent participation) x ($0.87 reduced-price reimbursement rate) x (185 school days);

- $865,115 in 2004-05 (42,541 enrolled students x 95 percent attendance rate) x (73 percent participation) x ($0.87 reduced-price reimbursement rate) x (185 school days) minus (42,541 enrolled students x 95 percent attendance rate) x (59.7 percent participation) x ($0.87 reduced-price reimbursement rate) x (185 school days);

- $1,125,300 in 2005-06 (42,541 enrolled students x 95 percent attendance rate) x (77 percent participation) x ($0.87 reduced-price reimbursement rate) x (185 school days) minus (42,541 enrolled students x 95 percent attendance rate) x (59.7 percent participation) x ($0.87 reduced-price reimbursement rate) x (185 school days); and

- $1,320,439 in 2005-06 (42,541 enrolled students x 95 percent attendance rate) x (80 percent participation) x ($0.87 reduced-price reimbursement rate) x (185 school days) minus (42,541 enrolled students x 95 percent attendance rate) x (59.7 percent participation) x ($0.87 reduced-price reimbursement rate) x (185 school days).

Exhibit 11-22 presents the incremental cost of the increased participation. Due to the nature of the foods served in Breakfast-in-a-Bag being mostly convenience foods and not requiring a great deal of preparation, very few additional labor hours will be required. In calculating the number of labor hours, it was assumed that the increase in participation would require an additional three hours per school in the first year for the 30 schools not currently participating. In subsequent years, the additional labor hours would increase by the incremental increase in participation. Assuming that the additional participation would require additional labor costs at $7.82 per hour (Pay Grade MT-2) and that food costs are 40 percent of revenue, the net savings would be $186,477 in 2003-04, $278,795 in 2004-05, $401,596 in 2005-06 and $493,168 in 2006-07.

Exhibit 11-22
Increased Revenues and Costs

Year	Participation Rate	Incremental Revenue	Food Costs	Labor Costs	Net Savings
2002-03	59.7%	$0	$0	$0	$0
2003-04	70%	$669,977	$267,991	$130,203	$271,783
2004-05	73%	$865,115	$346,046	$134,109	$384,960

2005-06	77%	$1,125,300	$450,120	$139,473	$535,707
2006-07	80%	$1,320,439	$528,176	$143,658	$648,605
2007-08	80%	$1,320,439	$528,176	$143,658	$648,605

Source: TSPR.

This fiscal impact assumes that the average participation rate will increase slightly each year until it reaches 80 percent. It is likely that there will be some fluctuation in participation rates throughout the five-year horizon. However, it is equally likely that once the program is established in every school, participation rates could climb to the high 80's and possibly 90 percent range, as has been seen in some schools that are currently operating Breakfast-in-a-Bag.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Expand the Breakfast-in-a-Bag program to every school in the district.	$271,783	$384,960	$535,707	$648,605	$648,605

Chapter 11
FOOD SERVICE

C. FINANCIAL MANAGEMENT

The financial management of food service operations has become a major emphasis of school districts nationwide. Food service operations are expected to be run like businesses and be self-supporting. To successfully manage a financially successful school food service operation requires knowledge of the financial goals and objectives of the school board; sound planning and budget development to meet the board's goals and objectives; and a financial accounting system that provides accurate and timely financial information to assist in managing revenues and expenditures.

Exhibit 11-23 reviews actual food service expenditures between 1996-97 and 2000-01. Total expenditures increased by 21.2 percent. The highest increase was in contracted services, 74.8 percent. The majority of BISD's contracted services involve contracts with food processors and with a local food warehouse to store its frozen foods. Payroll costs increased 30.7 percent over the five-year period. Capital outlay expenditures increased 18.1 percent.

Exhibit 11-23
BISD Food Service Department Expenditures
1996-97 through 2000-01

Expenditure Category	1996-97	1997-98	1998-99	1999-2000	2000-01	Percent Change 1996-97-2000-01
Payroll	$6,240,906	$6,442,622	$6,959,099	$7,462,715	$8,157,618	30.7%
Contracted Service	$618,034	$601,632	$605,312	$842,858	$1,080,034	74.8%
Food and Supplies	$7,771,134	$7,353,939	$8,250,565	$7,862,297	$8,508,365	9.5%
Other Operating Expenditures	$25,685	$25,966	$38,134	$35,278	$39,711	54.6%
Capital	$722,712	$616,755	$1,286,747	$582,340	$853,339	18.1%

Outlay						
Total Expenditures	**$15,378,471**	**$15,040,914**	**$17,139,857**	**$16,785,488**	**$18,639,067**	**21.2%**

Source: TEA, PEIMS, 1996-97 through 2000-01.

Exhibit 11-24 compares 2001-02 BISD budgeted expenditures against its peer districts. BISD had the largest operating budget of the peer group. Northeast ISD in San Antonio had the closest total budget. Plano ISD and Ysleta ISD operating budgets are nearly half of BISD's and Laredo's operating budget is substantially less. The largest components of the operating budget are payroll and food costs. BISD allocates the lowest percentage of its operating budget to payroll and food costs of the peer districts. Capital outlay expenditures budgeted by BISD for 2001-02 make up a greater percentage of the total budget than the peers, at 16.1 percent. On a per student basis, BISD apportions the highest dollar per student of any peer district, at $597.

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Exhibit 11-24
Food Service Budget Comparisons
BISD vs. Peer Districts
2001-02

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Expenditure Category	Brownsville	Corpus Christi	Laredo	North East	Plano	Ysleta
Salaries and Benefits	$10,701,622	$5,141,800	$3,903,336	$9,008,143	$6,732,155	$7,828,245
Contracted Service	$1,980,299	$760,600	$392,000	$1,173,000	$578,771	$274,700
Food and Supplies	$8,582,587	$5,346,100	$3,496,664	$6,667,817	$6,216,777	$5,242,884
Other Operating Expenditures	$55,000	$30,100	$16,500	$51,000	$239,909	$5,500
Capital Outlay	$4,085,571	$280,000	$196,000	$1,120,000	$93,754	$52,500
Total Expenditures	**$25,405,079**	**$11,558,600**	**$8,004,500**	**$18,019,960**	**$13,861,366**	**$13,403,829**
Expenditures as Percent of Total Budget						
Salaries and	42.1%	44.5%	48.8%	50.0%	48.6%	58.4%

Benefits						
Contracted Service	7.8%	6.6%	4.9%	6.5%	4.2%	2.0%
Food and Supplies	33.8%	46.3%	43.7%	37.0%	44.8%	39.1%
Other Operating Expenditures	0.2%	0.3%	0.2%	0.3%	1.7%	0.0%
Capital Outlay	16.1%	2.4%	2.4%	6.2%	0.7%	0.4%
Expenditures Per Student Ratios						
Enrollment	42,541	39,383	23,188	53,030	48,944	46,742
Expenditures per student	$597	$293	$345	$340	$283	$287

Source: TEA, PEIMS, 2001-02.

FINDING

The Food Services Department is effectively managed as an independent business unit that is held accountable for its performance and fiscal fitness. Food Service staff has clearly defined responsibilities, goals and objectives that foster a sense of pride and build a cooperative working environment. It is clear that the students are the priority.

The department controls food costs by pre-costing each ingredient when planning out menus and post-costing to determine whether the ingredients are cost effective and should be continued. This practice substantially reduces food costs.

Warehouse staff takes great pride in ensuring the quality of the food products being delivered to the schools. If a food item does not meet the specified standards, the warehouse does not accept delivery. The warehouse staff have challenged themselves to reduce the number of discrepancies in the monthly inventory. They have reduced the number of errors from 5 to 2 percent.

COMMENDATION

The focus of the BISD Food Services Department is to control costs and improve processes so that the nutritional needs of the students can be met.

FINDING

Food Services does not pay for the utilities it uses. Federal guidelines stipulate that these charges can be paid from food service funds rather than the district's general fund. This is one area where the district is not maximizing its federal expenditures. By not allocating these costs to Food Services, the district is taking dollars from the general fund that could be directed toward instruction. The department has an excessive fund balance that could be used to pay these indirect costs.

The costs of utilities, telephones and other indirect expenses can be allocated to food service operations based on the number of full time employees (FTE's) in Food Services compared to the total FTE's in the district. **Exhibit 11-25** sets the methodology for Food Services to budget these indirect costs.

Exhibit 11-25
Indirect Cost Allocation by FTE and Square Footage

	Methodology	Result	Methodology	Result
A	District's Total FTE Count	6,555.5	Total Square Footage - District	5,026,000
B	FTE Count for the Cafeteria	449.0	Total Square Footage - Cafeterias	489,625
C	Divide B by A	6.8%	Divide B by A	9.7%
D	Total Utility Costs	$8,547,346	Total Utility Costs	$8,547,346
E	Total Costs to be Allocated (C multiplied by D)	$581,220	Total Costs to be Allocated (C multiplied by D)	$829,093

Source: TEA, PEIMS, 2000-01 for actual utility costs and 2001-02 for FTE's and BISD Position Control Reports, 2001-02 and BISD Square Footage for Food Service Facilities Memorandum.

Recommendation 94:

Allocate utility costs in Food Service departmental budget.

By allocating indirect costs to the Food Service budget, the district's general funds can be directed toward the classroom. This method also provides a more accurate account of the department's actual expenditures.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief financial officer and the administrator for Food Services determine the costs for utilities that should be allocated to Food Services.	April 2003
2.	The chief financial officer develops and documents the procedures used to perform the allocation.	May 2003
3.	The chief financial officer ensures that Food Service indirect costs are properly allocated each month.	June 2003

FISCAL IMPACT

Using the cost allocation by FTE to calculate the most conservative fiscal impact, the district could direct $581,220 toward the classroom by allocating indirect costs to its food services program.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08
Allocate utility costs in Food Service departmental budget.	$581,220	$581,220	$581,220	$581,220	$581,220

FINDING

Food Services has an excess fund balance and risks having to send monies back to the federal government. Food Service Departments are supposed to run on a break-even basis. TEA limits the amount of reserves that can be held to three months of operating costs. Any excess funds must be invested in the food service program. Purchasing new food service equipment, purchasing and implementing a new POS computer system or renovating existing facilities are all examples of approved ways of spending excess fund balance.

BISD Food Service has run a surplus in excess of three months operating expenses since 1995. As of August 31, 2001, the department's unreserved fund balance was $12,267,447. Three months of operating expenses averages approximately $4.7 million. The department estimates that the ending fund balance at August 31, 2002 remains approximately $5 million over the allowed reserve. **Exhibit 11-26** highlights the capital investment the district has made in its food service infrastructure in the last four years.

Exhibit 11-26
Uses of Fund Balance
1998-99 through 2001-02

Expenditure	Amount
Renovate 22 elementary schools	$125,693
Implement wide area network	$305,089
Improvements in middle and high schools	$2,600,000
Equipment for new facilities	$1,087,317
Purchase of vehicles	$298,789
Annual replacement of equipment (for four years)	$1,600,000
Total	**$6,016,888**

Source: BISD administrator for Food Services.

In December 1996, the administrator for Food Services submitted a plan to TEA for spending the excess funds to the TEA. This plan was accepted in December 1996. Included in the plan was a proposal to spend $6,556,051 to build a new central food service facility. The new facility would include a central kitchen and a larger warehouse. The Food Services Department has held money in fund balance to help offset the expense of purchasing very expensive cook-chill equipment, freezers and coolers, furniture and other expenses that would be encumbered when the new facility was built. **Exhibit 11-27** outlines the correspondence between the TEA and BISD's administrator for Food Services with respect to its plan for spending down the excess fund balance. The plan has been extended four times, with the last extension approved in 2000. TEA is unlikely to extend the plan when the final extension expires in May 2003.

Exhibit 11-27
Correspondence with TEA
Uses of Fund Balance

First Approval		
December 10, 1996	Letter to TEA - "Plan for Reducing Excessive Operating Budget" - Proposed Plan/Equipment Replacement and Renovations.	TEA Approved - Implement plan by December 1998.
May 27, 1997	Fax to TEA - "Addendum to Request" - Expansion space of freezer facilities.	Request denied.
September 11, 1997	Letter to TEA - "Modified Plan for Reducing Excess Operating Budget/Fund Balance" - Approved requests that have been completed or in progress. Major part of plan has been placed on hold due to district review and future	Requested BISD provide a more detailed request.

	location.	
Second Approval		
October 30, 1997	Letter to TEA - "Plan for Reducing Excessive Operating Budget" - Detailed information to clarify our specific request to use school food service funds.	TEA approved request.
Third Approval		
November 18, 1998	Letter to TEA - "Plan for Reducing Excessive Operating Balance" - Request completion date be extended to December 2000.	Amended completion date from December 1998 to December 2000.
Fourth Approval		
November 20, 2000	Letter to TEA - "Request for Extension of Approved Plan" - Request completion date be extended to December 2002.	Extended completion date to the end of May 2003.

Source: BISD administrator for Food Services.

The Food Services Department has outgrown the existing facility. The warehouse has only one bay to handle vendor deliveries, to stage campus deliveries and to load food items on the trucks for campus deliveries. The freezer capacity is too small to store more than one week's worth of food items. The remaining frozen foods are stored off-site at an outside vendor's warehouse. Food Service truck drivers must go to the off-site warehouse, pick up all the items needed for the next week and take them back to the central warehouse to be stored in the central freezer. These items are then staged to be ready for delivery to the school cafeterias the following week. This process is labor intensive and a duplication of effort. It costs the district approximately $100,000 a year to store frozen food at the off-site warehouse. Additionally, the district leases dry storage for $60,000 per year

Although the land is available to build a new facility, the school board put the project on hold. It is considering including it in a bond package that would fund a support services facility to house Food Services, Maintenance and Facilities, Central Warehouse and a library. The board has not considered that these excess food services funds will be lost unless they can be expended for the exclusive use of school food service activities. As with any federal funding, the proceeds must be spent for the exact purpose they were intended or they must be returned.

A central kitchen would provide more control over the uniformity of products throughout the district. For example, in a decentralized system, one cafeteria cook might use a heaping teaspoon when mixing ingredients for cookies while another might use a level teaspoon. This discrepancy would cause the cookies to be different sizes. The administrator for Food Services believes that a central kitchen would increase efficiency, lower labor and food costs and provide a higher degree of quality control. The central kitchen would produce sandwiches, salads and bakery items.

Corpus Christi ISD operates a highly productive central kitchen that makes good use of space, layout and equipment. By preparing food for all district elementary schools in the central kitchen, CCISD has increased employee productivity, reduced food costs, while ensuring that better controls are in place to standardize the food items prepared in the kitchen.

Recommendation 95:

Use the excess fund balance to build the new Food Service facility, including a central kitchen and warehouse to avoid sending funds back to the government.

The department is spending $160,000 per year for cold and dry storage because the current warehouse is operating at capacity. Labor is used ineffectively when it is results in a duplication of effort. This drives up the cost of labor that would be eliminated with the new facility. The funds are available and are at risk of being lost if not used. If the administrator for Food Services submits a new plan for spending these excess funds, as an alternative she is considering, although the district will keep the money it will still need the facility. Building the facility now reduces the need for bond debt financing.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The administrator for Food Services makes a written request that the board considers allocating the necessary local funds to pour the foundation and put up the walls for the new facility.	April 2003
2.	The superintendent drafts an agenda item to hear the request.	April 2003
3.	The board considers the request and charges the administrator for Facilities and the administrator for Food Services to meet to lay out the specifications of the building.	May 2003
4.	The administrator for Food Services drafts a letter to TEA requesting an extension to the approved plan. The letter will include a timeline for when the money will be spent and a letter from the Board president stating that the district has approved	May 2003

	the facility.	
5.	The administrator for Facilities and the administrator for Food Services complete specifications to be included in the Request for Bid for building contractors and equipment manufacturers.	July 2003
6.	The Purchasing Department releases the Request for Bids.	July 2003
7.	The administrators for Purchasing Facilities and Food Services and the area supervisor for Maintenance and Equipment review each of the bids and make their recommendations to the board.	September 2003
8.	The board hears the committee's recommendation and votes to select the vendors for the project.	September 2003
9.	The project breaks ground.	November 2003
10.	The facility is opened and operational.	May 2005

FISCAL IMPACT

The cost for the food services facility was included in the 2002-03 budget with the exception of the structure itself. The facility would require local funds to construct the foundation and the shell of the building. However, there would be an associated savings from no longer having to pay storage costs. There would also be a labor cost savings realized with the increased efficiencies associated with the central kitchen. Delivery costs would be reduced since the delivery from the off-site warehouse and the central warehouse would be eliminated.

It would require approximately $3.4 million from the general fund to build the facility (88,000 square feet x $100 per square foot less the $5.4 million from food service funds to finish out building). There would be a savings of $160,000 (frozen food storage) per year beginning in 2005-06. The facility would reduce the need for 4 drivers and 2 warehouse specialists beginning that same year. This reduction in labor would save the district $142,316 ($8.25 per hour - Pay grade MT-4) x (4 drivers) x (8 hours per day) x (261 days per year) x (1.12 percent variable benefit rate) + ($9.46 per hour - Pay grade MT-5) x (2 specialists) x (8 hours per day) x (261 days per year) x (1.12 percent variable benefit rate) + ($3,483 x 6 employees for fixed benefits). The total savings realized by implementing this recommendation, beginning in 2005-06 will be $302,316. Additional savings will be derived from an increase in efficiency. However, these additional savings have not been included in the fiscal impact as they are difficult to quantify.

Recommendation	2003-04	2004-05	2005-06	2006-07	2007-08

One-time savings/(cost)	($3,400,000)	$0	$0	$0	$0
Elimination of frozen food storage and warehouse positions	$0	$0	$302,316	$302,316	$302,316
Total savings/(cost)	($3,400,000)	$0	$302,316	$302,316	$302,316

FINDING

The district is not in compliance with the provisions of the exclusive beverage contract. BISD has an exclusive beverage contract with Coca-Cola. Under the terms of this contract, BISD purchases all beverages served or sold by the district. When TEA reviewed the contract, it found two issues that the district had failed to address and noted in them in their findings.

The first issue was related to the specific language in the contract. Under paragraph 13 of the agreement, the district has provided the vendor with a right of first refusal upon the termination of the contract. According to TEA, this language is illegal. It authorizes the vendor, upon termination of the contract, to have:

"right of first refusal of any similar agreement regarding advertising and Beverage availability rights. As used herein, the right of first refusal shall mean that District shall commence negotiations with Advertiser two hundred ten (210) days prior to the end of the Term for a period of ninety (90) days. After such exclusive negotiation period, District shall be free to negotiate with any person for a period of ninety (90) days, however, if District receives a "bona fide offer" regarding such rights from a third party, then District shall be obligated to communicate such offer to Advertiser and Advertiser shall have thirty (30) business days from the date of such communication to offer contract with District on terms no less favorable to District than those contained in the bona fide offer of the third party."

This agreement is in violation of the TEC's purchasing statute. School districts are required to go out for bids for any items greater than $25,000. The exclusive beverage contract is a ten-year contract that is worth several million dollars. By offering the current vendor the "first right of refusal," the district has circumvented the state purchasing regulations.

The second TEA finding took issue with concerned the way the proceeds of the contract were being allocated. According to the contract, BISD Food Services Department was entitled to its pro-rata share of the contract. Food Services controls the majority of the beverage sales in the district. Under the terms of the contract, beverages are defined as:

- all hot and cold, carbonated and noncarbonated, nonalcoholic beverages, including but not limited to, carbonated soft drinks, frozen carbonated and noncarbonated beverages, packaged waters, natural or artificially flavored fruit juices, fruit juice-containing drinks and fruit-flavored drinks (sweetened or unsweetened), tea products, hypertonic, isotonic and hypotonic drinks, energy and fluid replacement drinks; and
- all drink or beverage bases, whether in the form of syrups, powders, crystals, concentrates or otherwise, from which such drinks and beverages could be prepared.

To date, the department has not received any of the proceeds from this contract. On October 11, 2001, the administrator for Budget drafted a memorandum to the administrator for Food Services and the chief financial officer. At that time, it was estimated that Food Services was owed $113,539 from the local maintenance fund. In arriving at the estimate, the administrator for Budget deducted utility costs from Food Services. No follow-up was performed on this matter. Although it is appropriate for Food Services to pay indirect costs with food service funds, no formal allocation of the excusive beverage contract was made or documented. In its policy related to exclusive beverage contracts, TEA presented the U.S. Department of Agriculture regulatory requirements as they pertain to these contracts:

- If the exclusive contracts do not involve school food service account funds, there are no Federal Child Nutrition Program procurement issues involved;
- If any nonprofit school food service products are purchased via the exclusive contract, then all Federal procurement requirements must be met.
- Additionally, if nonprofit school food service products are included in the contract, any rebates, commissions, scholarship fund contributions, or any other payments must be reimbursed back to the nonprofit school food service account on a prorated basis.
- Finally, since many of these contracts are multi-year, it should be noted that there is no Federal prohibition on multi-year contracts other than for food service management companies. It is suggested, however, that school procurement officials consider the impact of multi-year contracts, as opposed to single-year contracts, on the purchase of beverage and snack items. Long-term contracts would appear to be more appropriate for nonperishable products and services, such as warehousing and equipment rentals.
- School districts with existing contracts in place that include school food service products must reimburse the food service account its

prorated share in accordance with Item 3 above for the current and subsequent school years and maintain appropriate documentation.

BISD has not reimbursed these funds from local maintenance to food service, nor does the necessary documentation exist. TEA has the authority to withhold reimbursement dollars if it finds that the Food Services program is not in compliance. **Exhibit 11-28** summarizes the administrator for Business' calculation presented in the October 11, 2001 draft.

Exhibit 11-28
Exclusive Beverage Contract
1997-98 through 1999-2000

Fiscal Year	Pro-Rata Percentage	Pro-Rata Share of Proceeds	Utility Charges	Over/(Under) Pro-Rata
1997-98	57.92%	$448,880	$228,971	$219,909
1998-99	43.73%	$349,840	$229,444	$120,396
1999-2000	57.44%	$28,720	$255,486	($226,766)
Total		**$827,440**	**$713,901**	**$113,539**

Source: BISD Budget Administrator, October 11, 2001 Memorandum.

At a average pro-rata percentage of 53.03 and assuming beverage sales averaging $150,000 plus the $50,000 per year scholarship, the Food Services Department's pro-rata share would average $106,060 annually. The district is in its fifth year of the ten-year contract. However, if the district does not comply, it faces losing $106,060 of its annual federal funding until the problem has been corrected.

Recommendation 96:

Remit the pro-rata share of the exclusive vendor contract to Food Services as stipulated in the contract, document the transfer of funds and amend the language of paragraph 13 to be in compliance with purchasing laws.

BISD is a Provision II school and must have the funds available to pay for those students that would not be eligible for free or reduced-price meals. TEA requires the district to provide proper documentation to account for these funds. If the district is going to use the exclusive beverage contract to offset food service utility costs, it must provide the appropriate documentation. TEA has the right to hold back these funds requiring BISD to use local funds to make up the difference. The district must comply

with state purchasing laws and follow the terms of the contract. If it does not, it could be facing additional investigation and potential penalties from the TEA.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The interim superintendent and chief financial officer meet with the exclusive beverage vendor and prepare an addendum to the contract that nullifies paragraph 13.	March 2003
2.	The chief financial officer and the administrator for Food Services determine what the department's pro-rata share of the exclusive vendor contract should be.	June 2003
3.	The chief financial officer develops and documents the procedures used to perform the allocation.	July 2003
4.	The chief financial officer ensures that Food Service receives its allocation of the proceeds of this contract each month.	August 2003 and Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources. The anticipated proceeds from this contract have already been budgeted by the district; they will just be allocated differently.

Chapter 12
SAFETY AND SECURITY

This chapter reviews the safety and security in the Brownsville Independent School District (BISD) in the following sections:

A. Organization and Management
B. Security
C. Safety
D. Discipline Management

One of the most critical issues facing any school district is the safety and security of the adults and children that work, attend class, or visit its facilities. No Texas community, regardless of its size, location, or affluence, is immune from the potential of violence. As schools are faced with the reality that violence can happen at any time and any where, the district's educators, businesses, and parents must plan for potential problems and initiate solutions before a crisis occurs. This requires that policies and programs be in place to address the needs of the district and the unique environment in which it operates.

BACKGROUND

In its publication, *Keeping Texas Children Safe in School*, the Texas School Performance Review (TSPR) notes that the most effective districts have a safety plan based on strategies for prevention, intervention and enforcement. The report outlines suggested steps to take for each strategy, as shown in **Exhibit 12-1**.

Exhibit 12-1
Keeping Texas Children Safe in School
January 2000

Strategy	Steps to Take
Prevention	- Know your goals and objectives: where your district is going and what you want to accomplish. - Establish clear expectations for students, parents, teachers and administrators. - Address warning signs before they turn into trouble.
Intervention	- Look for trouble before it finds you. - Recognize trouble when you see it. - Have individuals in the right place and at the right time to

	intervene.
	• Have a plan of action appropriate for the occasion and practice it.
Enforcement	• Leave no room for double standards.
	• Ensure that discipline management extends inside and outside the classroom.
	• Alternative programs are not just a matter of compliance with the law; rather, they are many students' last chance at success.

Source: Texas School Performance Review (TSPR), Keeping Texas Children Safe in Schools, January 2000.

The Texas Legislature has also contributed and continues to contribute, to the safe-school effort by passing legislation related to a number of safety and accountability standards for Texas schools, as displayed in **Exhibit 12-2**.

Exhibit 12-2
Major School Safety Initiatives of the Texas Legislature
1993-2001

Legislation	Summary
1993 Legislature	
House Bill 23	Required information-sharing between law enforcement and schools on student arrests for serious offenses. Mandates that school principals must notify law enforcement if criminal activity occurs, or is suspected of occurring, on school grounds.
Senate Resolution 879	Encouraged collaboration between the Texas Education Agency (TEA) and Department of Public Safety in the recording of criminal incidents in the schools.
House Bills 633 and 634	Outlined the commissioning and jurisdiction of peace officers for school districts.
House Bill 2332	Authorized the State Board of Education to establish special-purpose schools or districts for students whose needs are not met through regular schools.
Senate Bill 16	Defined schools as drug-free zones.
Senate Bill	Created the safe-schools checklist.

213	
Senate Bill 155	Created the Texas Commission on Children and Youth.

1995 Legislature	
Senate Bill 1	Revamped the Education Code and laws on safety and security in schools, including the requirement for districts to establish alternative-education programs and, in counties with populations above 125,000, to establish juvenile justice alternative-education programs.

1997 Legislature	
Senate Bill 133	Rewrote the Education Code's safe-schools provision.

1999 Legislature	
Senate Bill 260	Allowed the expulsion of a student who assaults a school district employee.
Senate Bill 1580	Created the Texas Violent Gang Task Force.
Senate Bill 1724	Required each school district to annually report (beginning in 1999-2000) the number, rate, and type of violent and criminal incidents occurring at each school, and allowed them the option of including a violence prevention and intervention component in their annual school-improvement plans.
Senate Bill 1784	Allowed school districts to use private or public community-based dropout-recovery-education programs to supplement alternative-education programs.
House Bill 152	Made the act of placing graffiti on school property a felony.
House Bill 1749	Encouraged school districts and juvenile probation departments to share information on juvenile offenders.

2001 Legislature	
Senate Bill 430	Funded the Texas School Safety Center, which will provide a resource for schools on safety training and school safety audits, and set training standards for school resource officers.
Senate Bill 1432	Defined the duties and powers of peace officers and attendance officers in enforcing truancy laws.
House Bill 1088	Defined additional categories of misbehavior, including false alarms or threats made by a student, as reasons for student

	placement in an alternative-education program.
House Bill 2204	Established the Safe Routes to School Program to provide funds for safety projects in and around schools.

Source: TSPR, 1999 and updated through Texas Legislature Online, 2001.

Finally, federal legislators support safe schools by providing funding to state and local governments for the Safe and Drug Free Schools (SDFS) program. This funding promotes the development of programs that prevent violence in and around schools. The SDFS program consists of a state grants program and a national program. The authorization for the program is found in Title IV of the federal *No Child Left Behind* Act of 2001. Texas schools that receive Title IV funds are given the discretion to decide the most effective way to apply the money and are required to report violent-incidents rates to the state. The Texas Education Agency (TEA) serves as the fiscal agent that distributes SDFS monies to the participating districts in Texas.

Ensuring a safe and secure district requires coordination between district and school administrators, teachers, counselors, students, parents, board members, and the community. Such coordination requires a districtwide approach to safety and security. Staff resources must be organized in a way that minimizes duplication while at the same time ensures that all critical functions are assigned to a department or staff member; effective communication must exist so that information pertaining to safety and security can be shared; and reporting systems must be in place to ensure that all schools are consistently ensuring the safety of their students and employees.

Several individuals and departments are responsible for ensuring the safety and security at BISD:

- The BISD Police Department and Security Services provides law enforcement and security services to the district;
- The Guidance and Counseling Department oversees the Safe and Drug Free Schools and Communities (SDFSC) program and produces and distributes a Crisis Management Manual relating to counseling service delivery;
- The principals and assistant principals at each school provide the first line of disciplinary management, are in charge of referring students to the district's Alternative Education Center (AEC), ensure that their school utilizes the *Crisis Intervention and Response Handbook* (the "Red Book"), issue keys to their buildings and assign hall monitors and crossing guards to their respective schools;

- The AEC is the district's alternative-education school for students with behavioral problems;
- The department of Admissions and Attendance, along with two attorneys that serve as the district's hearing officers, assist with the student appeals and expulsions process to ensure due diligence;
- The Insurance and Safety Department inspects fire alarm systems;
- The Transportation Department is responsible for school bus safety by conducting safety seminars, training for drivers and bus inspections; and
- The District Education Improvement Committee ensures that districtwide goals for safety and security are included in the District Improvement Plan (DIP).

Chapter 12
SAFETY AND SECURITY

A. ORGANIZATION AND MANAGEMENT

BISD created the BISD Police Department and Security Services in 1992. The mission of the department is to work with all citizens to preserve life, maintain human rights, protect property and promote individual responsibility and community commitment.

The BISD Police Department and Security Services operated under a $2.8 million budget during the 2001-02 school year. The budget increased 17 percent from 2000-01, when it was then $2.4 million. **Exhibit 12-3** shows the detailed budget for the 2001-02 school year for the BISD Police Department and Security Services.

Exhibit 12-3
BISD Police Department and Security Services
2001-02 Budget

Budget Category	Dollar Amount
Salaries and Benefits	$2,505,850
Purchased and Contracted Services	$144,012
Supplies and Materials	$89,648
Other Operating Expenses	$11,170
Total	**$2,750,680**

Source: Texas Education Agency (TEA), Public Education Information Management System (PEIMS), 2001-02.

The 2001-02 budget for the BISD Police Department and Security Services was higher than its peer district's budgets, with the exception of Ysleta ISD. **Exhibit 12-4** shows the 2001-02 budgets for BISD and its five peer districts in relation to the number of students in each respective district.

Exhibit 12-4
2001-02 Budget for Security Function
BISD and Peers

District	Security Budget	Number of Students	Expenditures per Student
Brownsville	**$2,750,680**	**42,541**	**$65**
Corpus Christi	$1,760,314	39,383	$45
Laredo	$1,390,850	23,188	$60
Northeast	$2,522,774	53,030	$48
Plano	$2,506,081	48,944	$51
Ysleta	$3,089,919	46,742	$66

Source: TEA, PEIMS, 2001-02.

FINDING

The BISD Police Department and Security Services is not appropriately organized or staffed to meet the district's security needs, since their organization is currently in transition. In November 2002, the district provided an organization chart to the TSPR review team that the Police Department and Security Services is transitioning towards, however, the reorganization is still in process. **Exhibit 12-5** presents their targeted organizational structure.

Exhibit 12-5
BISD Police Department and Security Services Targeted

Organization
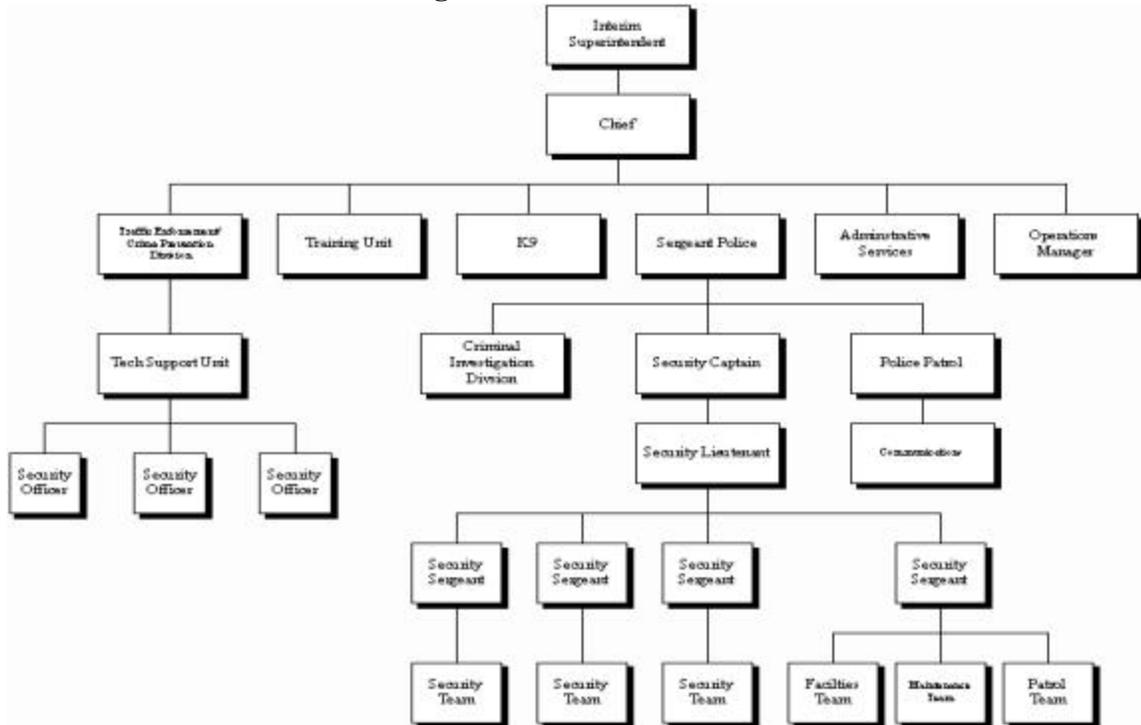
Source: BISD Police Department and Security Services, November 2002.

During September 2002, a current organization chart of the department was not available. Based on interviews, though, with employees in the Police Department and Security Services, the chart depicted in **Exhibit 12-6** was developed and verified.

Exhibit 12-6
Organization of BISD Police Department and Security Services
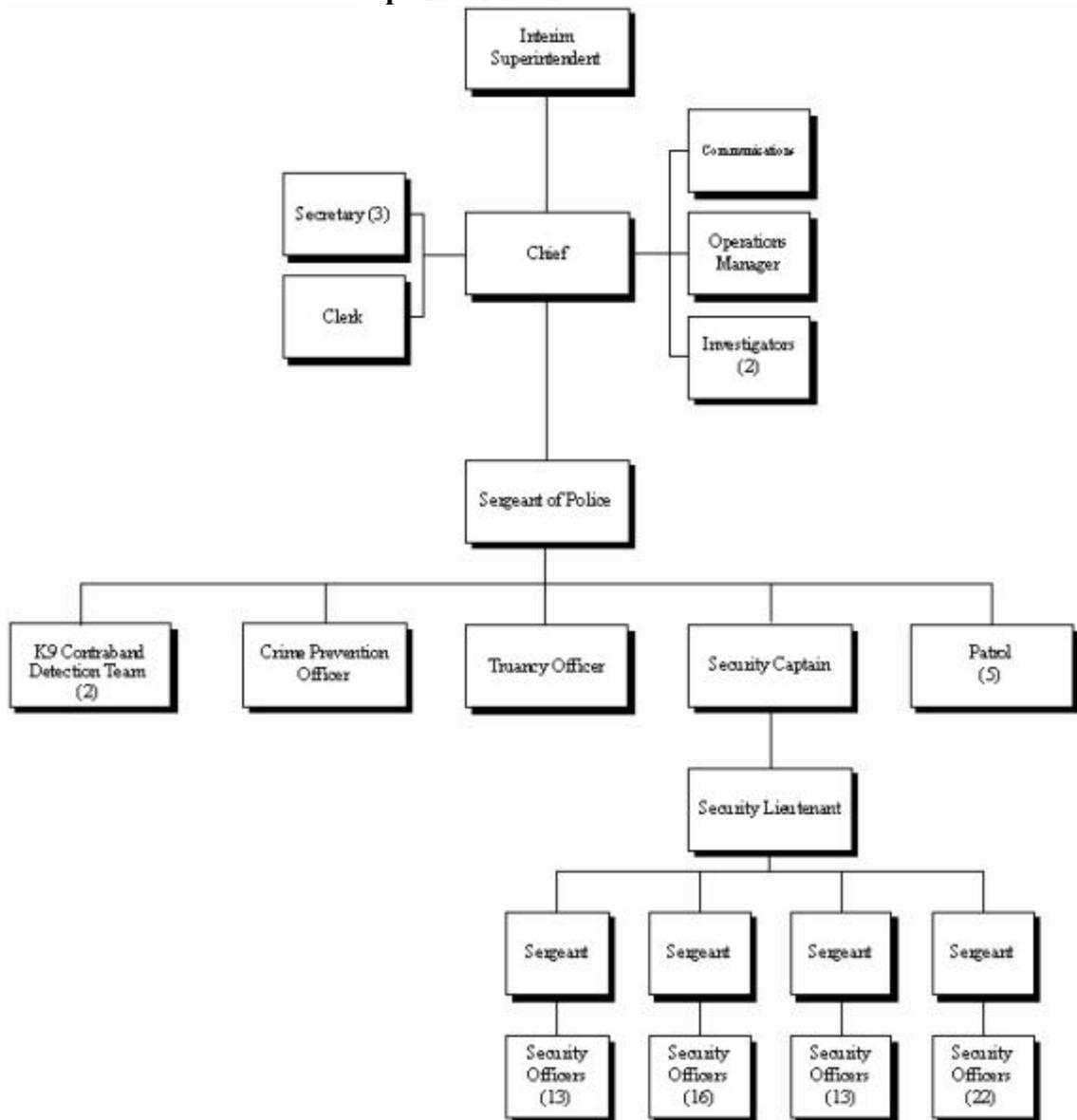
September 2002

Source: Employee Positions Report and Interviews with BISD Police and Security Services Staff, September 2002.

The chief of police, who reports directly to the BISD superintendent, is responsible for overseeing all operations within the department. Reporting to the chief are three secretaries, a clerk, the operations manager, two investigators, the sergeant of police, and an entire communications team made up of five dispatchers and a supervisor, who is one of the department's five security sergeants. The dispatchers answer calls for service from the department, acting as a liaison between the person making the call and the security personnel that responds to the call. The dispatchers also monitor the security alarms at each school. Every school

in the district has a security alarm, although some have surveillance cameras, too. The cameras are monitored by campus level staff.

Ten positions report directly to the sergeant of police: two K9 officers, the crime prevention officer, the truancy officer, the security captain and five patrol officers. There is also a security captain, who has a security lieutenant reporting to him, and there are four security sergeants reporting to the lieutenant. One of the four security sergeants is in charge of overseeing the security officers that monitor the district's facilities. The facilities team consists of 22 security officers: four security officers staffed at the Transportation Department, six at the Maintenance Department, two at the administration building, one on special assignment, two at the Aiken and Besteiro portables and seven on patrol duty.

The other three security sergeants reporting to the security lieutenant oversee the 42 school-based security officers. Two elementary schools, every secondary school, the Alternative Education Center (AEC) and the Teen Learning Community (TLC) have one to three security officers staffed during regular school hours. **Exhibit 12-7** lists the total number of security officers at each campus.

Exhibit 12-7
Number of Security Officers by Campus
2002-03

Campus	Number of Security Officers
Hanna High School	3
Lopez High School	3
Pace High School	3
Porter High School	3
Rivera High School	3
Besteiro Middle School	2
Central Middle School	2
Cummings Middle School	2
Faulk Middle School	2
Garcia Middle School	3
Lucio Middle School	2
Oliveira Middle School	2

Perkins Middle School	2
Stell Middle School	2
Vela Middle School	2
Vermillion Elementary	1
Aiken Portables	1
Alternative Education Center	2
Teen Learning Community	2
Total	**42**

Source: BISD Security Officer Staffing List, 2002-03.

The BISD Police Department and Security Services has a total of 94 employees. **Exhibit 12-8** lists the number of employees at each position in the organization.

Exhibit 12-8
BISD Police and Security Services Personnel
2002-03

Position	Number of Employees
Chief of Police	1
Sergeant of Police	1
Secretary	3
Clerk	1
Operations Manager	1
Dispatchers	5
Investigators	2
Truancy Officer	1
Crime Prevention Officer	1
Patrol Officers	5
K9 Officers	2
Security Captain	1
Security Lieutenant	1

Security Sergeant	5
Security Officers	64
Total Number of Employees	**94**

Source: BISD Classified Personnel Report, Security Services, September 2002.

There are two types of officers responsible for security within the district: commissioned peace officers and security officers. There are a total of 13 commissioned peace officers: the chief, two investigators, the crime prevention officer, the truancy officer, two K9 officers, the sergeant and five patrol officers. But the number of commissioned peace officers is small when compared to the amount of security officers watching over the district; there are 71 of them.

The primary distinction between the two positions is that security officers perform a monitoring role rather than an enforcement role. Their responsibilities consist of simply observing the district's facilities and schools, where they act as a passive but visible deterrent against criminal activity. Security officers are not able to conduct criminal investigations or search a student after witnessing a criminal offense. Commissioned peace officers, are trained in and are responsible for upholding the Texas Penal Code and the Code of Criminal Procedures. Furthermore, commissioned peace officers can issue citations.

Exhibit 12-9 lists some of the essential duties and responsibilities of the security officers and peace officers at BISD according to their respective job descriptions.

Exhibit 12-9
Security Officers and Peace officers
Essential Duties and Responsibilities
2002

Security Officer	**Commissioned Peace Officer**
Assists BISD campus/facility administrators in the orderly operation of schools/facilities.	Enforces laws, including federal and state statutes and district rules and regulations.
Proactively monitors activities at duty site to prevent theft, vandalism, burglary and other criminal and/or inappropriate behaviors.	Maintains liaison with federal, state and local law enforcement agencies, including assisting in the serving of warrants within district boundaries.
Communicates with supervisors, staff, teachers. students, the public and law	Responds and investigates any calls from schools concerning security

enforcement agents when deemed necessary to resolve any situation.	problems.
Checks to ensure personnel have secured all windows, doors, and buildings.	Patrols assigned routes by walking the grounds or driving within the perimeter of district buildings, which allows them to prevent fires, theft, vandalism, and illegal entries.
Monitors campus pedestrians, vehicular traffic day and night, and reports suspicious and/or unusual activity.	Inspects and secures doors, windows, lights, and gates when building is vacant.
Strives to continuously promote the safety, health, and comfort of all students and employees in the performance of their duties.	Prepares offense and incident reports, and ensures thoroughness of information contained in police reports.
Prepares reports and performs other tasks that may be assigned by supervisors and/or school administrators.	Takes action on all criminal matters and notifies police, fire department, or other appropriate authority of any situation that requires their assistance when needed.
Checks any suspicious activity.	Maintains current knowledge of legal codes and procedures.
Maintains professional growth by attending in-services and meetings as requested/required.	Maintains Texas Commission on Law Enforcement Officer Standards and Education (TCLEOSE) requirements for firearm safety and use.
Follows established safety procedures and techniques to perform job duties.	Demonstrates investigative skills necessary for proper case management.

Source: BISD Security Services Job Descriptions, Commissioned Peace Officer and Security Officer, 2002.

Security officers on night patrol act as the first response to alarm calls. According to security personnel, if an alarm goes off at one of the district's schools, a security officer is dispatched to the grounds armed with only a pair of handcuffs and a flashlight. After arrival, the security officer inspects the school to determine why the alarm was triggered. If there is a burglar present, the security officer calls the district's dispatch, who then calls the Brownsville Police Department's (BPD) dispatch. A BPD officer is sent to respond as backup. The BPD is responsible for sending a backup officer because the district's police department does not have the

manpower necessary to schedule a commissioned peace officer to patrol the night shift.

Because security officers are not authorized to carry weapons, they are continuously placed in a potentially dangerous situation when they act as first response to an alarm call, particularly with the prospect of approaching an armed burglar. One security officer, for example, was injured when he was struck in the head with a brick while approaching a school that was being burglarized. Because BISD security officers are often dispatched to situations that could cause them to act outside their authority creates a high liability risk for the district. Commissioned peace officers, when placed in dangerous circumstances, have certain powers, privileges, and immunities at their disposal that make them the more obvious and appropriate staffing solution to night patrol.

In addition, the security officers staffed at district schools during school hours are not authorized to respond to numerous potential threats. For example, BISD's districtwide policy regarding visitors to the schools states that a visitor not registered with the school office is considered to be illegally on school property, and he or she will be asked to properly identify themselves or leave the school grounds. If the visitor refuses to leave, or creates any disturbance, the principal has the right to request aid from law enforcement. Security officers are not authorized to act on such an incident.

Exhibit 12-10 depicts the flow of information beginning with the alarm call and ending with a commissioned peace officer responding to the scene.

Exhibit 12-10
Process Flow for Alarm Calls
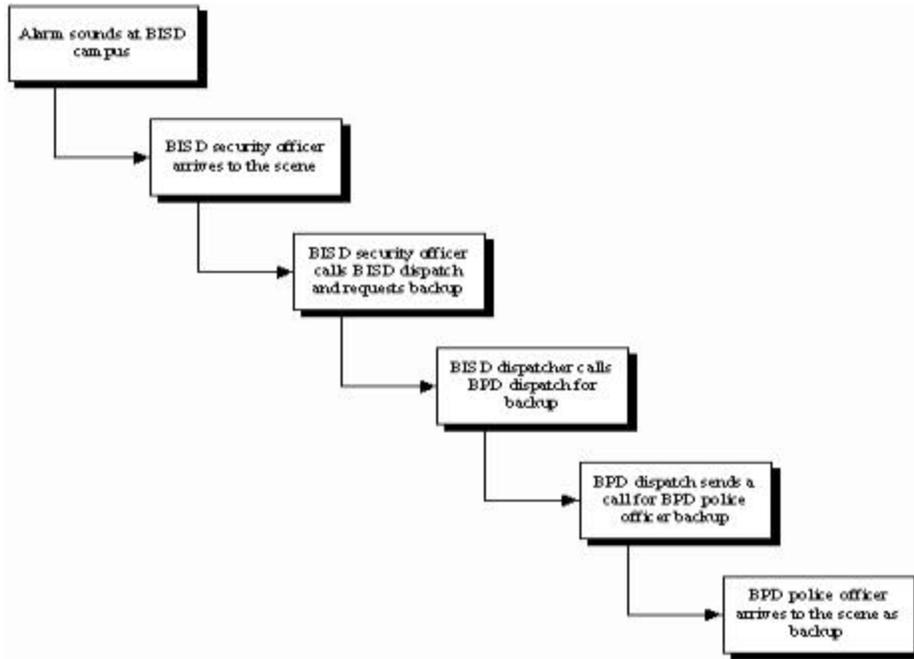
Source: TSPR, 2002.

In the wake of recent tragedies like the sniper attacks in the Washington, D.C. area, which resulted in a 13-year-old boy being shot outside of a middle school, it is imperative that school districts be prepared for the possibility of similar incidents.

The number of reported incidents, from 1999-2000 through 2001-02, has risen at every school but four. Oliveira Middle School saw the largest increase, at 122 percent. **Exhibit 12-11** lists each school with their respective increase or decrease in the number of incidents occurring between the 1999-2000 and 2001-02. Districtwide incidents have risen by 16 percent from 1999-2000 through 2001-02.

Exhibit 12-11
Number of Incidents Per Campus
1999-2000 through 2001-02

School	1999-2000	2000-01	2001-02	Increase/(Decrease) Between 1999-2000 and 2001-02
Hanna High School	1,001	1,405	1,111	11%
Porter High School	217	214	314	45%

Pace High School	276	295	535	94%
Rivera High School	308	354	280	(9%)
Lopez High School	637	559	794	25%
Central Middle School	333	487	339	2%
Cummings Middle School	818	691	538	(34%)
Faulk Middle School	293	282	506	73%
Stell Middle School	418	416	544	30%
Oliveira Middle School	536	626	1,192	122%
Perkins Middle School	684	781	1,104	61%
Vela Middle School	481	393	423	(12%)
Besteiro Middle School	495	713	638	29%
Lucio Middle School	901	612	299	(67%)
Total	**7,398**	**7,828**	**8,617**	**16%**

Source: TEA, PEIMS Disciplinary Action Summary, 1999-2000 through 2001-02.

Security officers are in charge of monitoring the district to help prevent theft, vandalism, burglary and other criminal or inappropriate behavior in one of three areas: schools, facilities and districtwide patrol. **Exhibit 12-12** shows a summary of the survey results for each group responding to the survey regarding vandalism.

Exhibit 12-12
Survey Responses to
Vandalism is not a problem in this district.

Group	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
Administrators	1.4%	12.2%	18.9%	48.6%	17.6%	1.4%
Principals	0.0%	30.4%	17.4%	26.1%	21.7%	4.3%
Teachers	3.2%	15.2%	10.8%	55.1%	15.8%	0.0%

Source: TSPR Survey Results, September 2002.
*Note: While these surveys were not scientifically administered, in a random sampling of 550 teachers, 700 administrators and 70 principal that were sent surveys, 158 teachers,

Other school districts with similar enrollment have transformed their security departments into formal district police departments and typically do not employ security officers. Plano ISD (PISD), with a 2001-02 enrollment of 48,944, compared to BISD's 2001-02 enrollment of 42,541, maintains a Police Department and employs a core staff of full-time, commissioned peace officers. In addition to the director, deputy director, two dog handlers, three security police specialists, two clerks, and one dispatcher, the PISD Police Department has 132 commissioned peace officers assigned to duty throughout the district each day. The district does not employ any security officers.

Many districts also employ School Resource Officers (SROs), which, according to the Center for the Prevention of School Violence, is a commissioned peace officer who is permanently assigned to provide coverage to a school or a set of schools. The SRO is specifically trained to perform three roles: law enforcement officer; law-related counselor; and law-related education teacher.

The Texas State Technical College (TSTC) in Harlingen, approximately 25 miles from Brownsville, offers basic peace-officer training. The training is $850 per person plus the cost of three uniforms at $30 a piece. A part-time course requires that students attend class three nights a week from 6 p.m. to 10 p.m. and all day Saturday, for a total of 930 hours. The full-time course takes approximately six months to complete and requires students to attend class for eight hours a day Monday through Friday.

Recommendation 97:

Reorganize the BISD Police Department and Security Services and replace some of the security officers with commissioned peace officers.

A spokesperson for the training program at TSTC stated that they would be "more than willing" to negotiate an arrangement by which BISD can provide either facilities or certified staff for training classes in order to reduce the total tuition per student. Both options, according to a spokesperson for the training program, could "significantly" reduce the total tuition per student. The district can provide an instructor for the training program since the interim chief of police of the BISD Police Department and Security Services is a certified Texas Commission on Law Enforcement Officer Standards and Education (TCLEOSE) instructor. The district is capable of providing facilities for the training through the use of one of their many classrooms. Using these assets would provide the district with a cost-effective means of increasing the number of certified peace officers in the district while decreasing the number of

security officers. The training can be offered as an incentive to security officers already staffed in the BISD Police Department and Security Services that are qualified for and interested in becoming a commissioned peace officer.

During the 2002-03 school year, the chief of police should select 19 security officers in the district to attend basic peace-officer training at TSTC. The officers should attend the part-time training so as to not leave the schools unstaffed by security during school hours. Once the 19 officers get back from training at the end of 2003, 18 of them will be staffed at a campus: one at each of the five high schools, one at each of the 10 middle schools, one at the TLC. and two at the AEC. The other newly commissioned peace officer will be a replacement for the patrol officer currently staffed at the district, who should be promoted to sergeant of the SROs. The security officers selected to attend basic training and the peace officer promoted to sergeant will be selected by the chief of police based on performance evaluations from previous years. The current sergeant will become the lieutenant of the department reporting to the chief.

Out of the remaining 52 campus-based facilities, patrol and supervisory security officers, the chief of police should select 12 to attend basic peace-officer training. Of these newly trained commission officers, three of the existing peace officers in the department will be promoted to sergeant of patrol: one of shift "A", one of shift "B" and one of shift "C". Therefore three of the 12 newly commissioned officers will replace these three positions. The other nine officers will serve on patrol. The district already has five patrol officers, but has a need for an additional nine officers for a total of 14 patrol officers. Four officers will patrol shift A from 6 a.m. to 2 p.m., five will patrol shift B from 2 p.m. to 10 p.m. and five will patrol shift C from 10 p.m. to 6 a.m.

Of the remaining 40 security officers, one should be staffed as the security sergeant supervising the communications team; 14 as facilities security officers with one sergeant of security serving as a supervisor for a total of 15. The other 18 security officers should be staffed with one officer at each secondary campus and three to be placed in the area of greatest need. Once these 40 individuals are selected, the remaining six security officer positions should be eliminated.

After all of the changes to the department are made, the organization of the department will be significantly different. **Exhibit 12-13** shows the organization chart of the department after all changes are made.

Exhibit 12-13
Recommended Departmental Organization
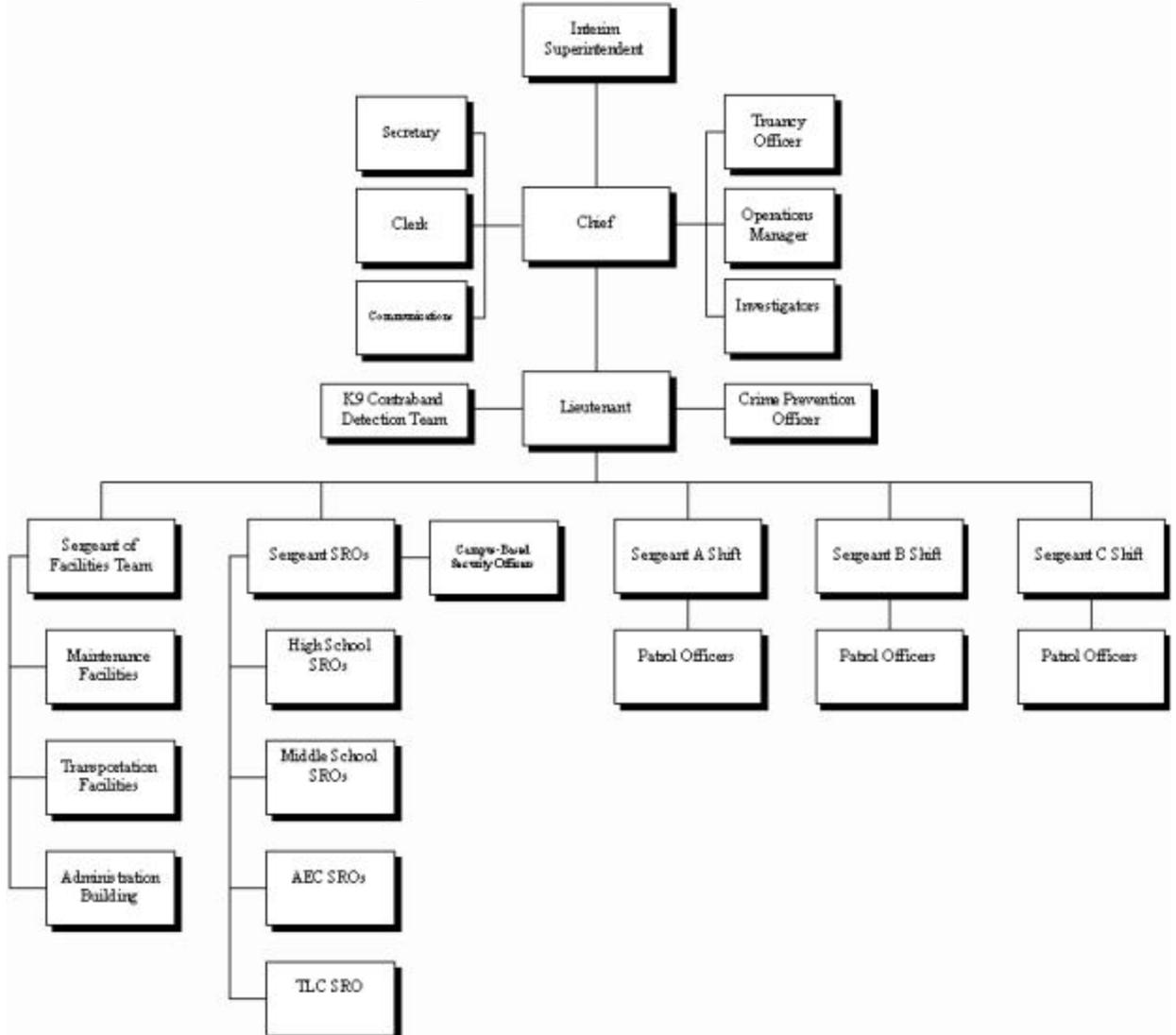
Source: TSPR, 2002.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief of police develops a plan to restructure the BISD Police Department and Security Services and submits the plan to the superintendent for approval.	May 2003
2.	The chief of police, the superintendent, and the director of the basic peace officer training program at TSTC negotiate a deal whereby the district provides facilities and/or instructors for the program in exchange for reduced tuition costs.	June 2003
3.	The chief of police reviews performance evaluations from	July 2003

	previous years to select the 19 most qualified security officers to attend basic peace-officer training.	
4.	The 19 officers attend basic training.	October 2003-August 2004
5.	The chief of police reviews performance evaluations from previous years to select one of the department's commissioned peace officers to be promoted to sergeant of SROs.	July 2004
6.	The chief of police makes an announcement to the department about the officer selected for promotion to sergeant, effective September 2004, and that the current sergeant is being promoted to lieutenant.	August 2004
7.	Eighteen of the 19 officers that returned from training in August are staffed at the schools as SROs and one is staffed in patrol.	September 2004
8.	The chief of police reviews performance evaluations from previous years to select 12 security officers to attend basic training.	September 2004
9.	The chief of police eliminates 6 security officer positions.	October 2004
10.	The 12 security officers attend basic training.	October 2004- August 2005
11.	The chief of police reviews performance evaluations from previous years to select three of the department's commissioned peace officers to be promoted to sergeant of patrol, one from each shift.	July 2005
12.	The chief of police makes an announcement to the department about the three officers selected for promotion to sergeant, effective September 2005.	August 2005
13.	The 12 officers that returned from training in August are staffed in patrol or serve as a replacement to the officers promoted to sergeant.	September 2005

FISCAL IMPACT

The fiscal impact of this recommendation is based on the cost of uniforms for commissioned peace officers of $1,653, training of $940 and the average annual salary plus benefits of the following positions:

Position	Average Annual Salary	Variable Benefits at 12 Percent	Fixed Benefits	Total Salary Costs	Increase Between Positions
Security Officers	$17,332	$2,080	$3,483	$22,895	N/A
Commissioned Peace Officers	$25,998	$3,120	$3,483	$32,601	$9,706
Sergeants	$32,987	$3,958	$3,483	$40,428	$7,827
Lieutenants	$38,469	$4,616	$3,483	$46,568	$6,140

The fiscal impact to the district will start 2003-04 when the first group of officers begins training to become commissioned peace officers. Costs and savings to the district are calculated as follows:

Changes	2003-04	2004-05	2005-06	2006-07	2007-08
Training: (19 at $940) (12 at $940)	($17,860)	($11,280)			
Security Officers to Commissioned Peace Officers: (19 at $9,706) (12 at $9,706)		($184,414)	($184,414) ($116,472)	($184,414) ($116,472)	($184,414) ($116,472)
Commissioned Peace Officers to Sergeants: (1 at $7,827) (3 at $7,827)		($7,827)	($7,827) ($23,481)	($7,827) ($23,481)	($7,827) ($23,481)
Sergeant to Lieutenants: (1 at $6,140)		($6,140)	($6,140)	($6,140)	($6,140)
Uniforms for Commissioned Peace Officers: (19 at $1,653) (12 at $1,653)		($31,407)	($19,836)		
Reduce Security Officers: (6 at $22,895)		$137,370	$137,370	$137,370	$137,370

Total	($17,860)	($103,698)	($220,800)	($200,964)	($200,964)
Recommendation	**2003-04**	**2004-05**	**2005-06**	**2006-07**	**2007-08**
Reorganize the BISD Police Department and Security Services and replace some of the security officers with commissioned peace officers.	($17,860)	($103,698)	($220,800)	($200,964)	($200,964)

FINDING

The procedures manual for the BISD Police Department and Security Services is not annually updated. While the BISD Police Department and Security Services has a comprehensive procedures manual that governs the department by making available to all department personnel the rules and regulations they are required to follow, parts of the manual have not been revised. The manual provides civil rules and regulations, general orders, operational procedures, special orders, district policies, and other important information.

The sergeant of police of the BISD Police Department and Security Services is currently revising the manual, adding new chapter content that hasn't been defined or discussed until now and deleting parts of the manual that are no longer relevant.

One example of a procedure that is not included in the manual is the fact that the commissioned peace officers are issued bulletproof vests as part of their uniform, yet they are not required to wear them. Each vest costs $399. Another example is that there is no procedure that outlines how security personnel are to be assigned to the individual schools. The standard in the department is to assign three officers to each high school, two to each middle school and none at the elementary schools. However, one elementary school has a security officer on staff after the school's principal sent a memo to the superintendent requesting an officer. The request was a result of the school's principal simply asking for an officer, as opposed to the principal making a specific claim about a unique condition surrounding the school that warranted having an officer there during school hours. The

BISD Police Department and Security Services made an exception to their standard by staffing a security officer at the school.Unfortunately, the department was not able to add a security officer to their staff in order to

counter the loss of the officer to the elementary school. Instead, they had to move a security officer from another area.

Without a procedure in place that outlines the circumstances under which a security officer is staffed at an elementary school, all of the elementary schools could potentially start requesting security officers, putting the BISD Police Department and Security Services at a need for additional resources at their own expense. Another possible result of the lack of proceduresis that BISD Police Department and Security Services decreased the number of security officers at secondary schools in order to meet the demands of the elementary schools.

Security departments in many school districts place a high priority on ensuring that policies and procedures are relevant to the type of work conducted by their employees on a daily basis. This requires a formal process for revising the content of the departmental procedures manual. This is particularly important in an area like security since changes in law and court rulings are constantly changing the way officers are to carry out their responsibilities. All employees must be informed how to handle various situations and the procedures governing such behavior provides strong support in the event that an employee's actions must be justified.

By creating and updating a procedures manual that prescribes duties and officer conduct, Spring Independent School District (SISD) provides written guidelines for its police officers and department. The police chief created a procedures manual, which he updates annually, that prescribes each officer's duties and directs officer conduct. The department manual is detailed and comprehensive, covering subjects such as expected attendance, on-duty and off-duty personal behavior, use of firearms, and use of force. The procedural guidelines have been adopted to direct officers in performing their duties in an ethical manner.

Recommendation 98:

Annually review and update the BISD Police Department and Security Services procedures manual.

After the sergeant of police completes the task of making initial revisions to the procedures manual, there needs to be a method in place that ensures the manual is annually reviewed and updated to reflect the general needs of the department. Beyond an annual revision, there are also changes in law, court rulings and other instances that demand changes of a more immediate nature. A record of revisions should be used to keep track of revisions that are made to the manual reflecting what revision was made, on what date it was made, and the reason for the revision.

This record should be distributed to employees for their reference. Copies of the revised manual should be made available for appropriate personnel to access at key locations like each campus library or administrative building or at police department offices.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The secretary for the chief of police develops a tracking record for review and revisions made to the procedures manual.	March 2003
2.	The chief of police updates the manual annually.	Annually
3.	The chief of police provides revisions to the superintendent for review and comment.	Annually
4.	The superintendent submits the revised manual to the board for review and approval.	Annually
5.	The chief of police makes copies of the revisions record and distributes a copy to key locations, and then disseminates the new updates to the procedures manual staff.	Annually

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 12
SAFETY AND SECURITY

B. SECURITY

Security functions include the enforcement of state and local laws and school rules and the administration of appropriate punishment. Effective enforcement must be fair, consistent, certain and swift, while still allowing for open communications among students and security personnel. Basic security and enforcement functions are essential to control day-to-day student activities and ensure that students comply with established codes of conduct.

FINDING

The K9 officers at BISD are actively engaged in the interdiction of drugs, as well as prevention efforts at the school level. The mission statement of the BISD K9 detection team is "to provide a safe learning and working environment for all students and employees by deterring narcotics and weapons from district property." The K9 officers have their own procedures manual in addition to the procedures manual from the BISD Police Department and Security Services. The Canine Team Procedures Manual provides comprehensive information about the reports and tracking software used by the K9 officers, the vehicle used by the officers, the kennels for the dogs, uniforms, responsibilities, guidelines for conducting searches, and procedures.

The K9 officers handle two drug dogs used to detect contraband at the district's schools. Both dogs were already trained when they were purchased from Kasseburg, a canine training center based in Alabama. The officers and their dogs randomly search three schools per day. At each of these schools, the officers can either search six classrooms, three classrooms and the gym, or three classrooms and the parking lot. The combination is determined by the school's principal. Principals, school staff, and district administrators can also request the K9 officers' presence at district events and other extracurricular functions. Often times the officers are asked to search luggage and buses before student trips. During the 2001-02 school year, the use of contraband detection dogs resulted in five drug-related arrests.

In addition to conducting random searches, the K9 officers also give presentations at the schools, particularly to the elementary and middle schools. One of the officers said that the reason they target the elementary and middle schools is to reach kids while they are young and to help them stay on track by teaching the consequences of using drugs. The officers

participate as presenters during Career Day presentations and Violence Prevention Week, both hosted by the Counseling and Guidance Department. The officers are given the opportunity to talk to students about what they do, as well as answer questions.

COMMENDATION

The K9 officers at BISD are actively involved in both drug interdiction and prevention efforts.

FINDING

Security personnel are not assigned to schools based on coverage ratios. A coverage ratio compares the demand for security at individual schools with the number of security personnel, ensuring that schools with a higher number of incidents are assigned a higher number of security personnel.

The standard for the number of security officers at a campus in BISD is two for each middle school and three for each high school. However, a review of TEA's Public Education Information Management System (PEIMS) data shows that some of the middle schools have a significantly higher number of incidents than some of the high schools, yet these middle schools still have fewer security officers. **Exhibit 12-14** lists the number of incidents reported on the PEIMS student disciplinary action report for each campus during the 2001-02.

Exhibit 12-14
Number of Incidents Per Campus
2001-02

Campus	2001-02
Hanna High School	1,111
Porter High School	314
Pace High School	535
Rivera High School	280
Lopez High School	794
Central Middle School	339
Cummings Middle School	538
Faulk Middle School	506
Stell Middle School	544

Oliveira Middle School	1,192
Perkins Middle School	1,104
Vela Middle School	423
Besteiro Middle School	638
Lucio Middle School	299
Total	**8,617**

Source: TEA, PEIMS Disciplinary Action Summary, 2001-02.

Despite the fact that one of the district's middle schools had a higher number of incidents during the 2001-02 school year than three of the high schools combined, the schools still have fewer security officers.

School districts that use coverage ratios when assigning security personnel to their schools ensure that each school receives an adequate level of safety for its students and employees based on the number of incidents the school has experienced in the past.

Recommendation 99:

Apply coverage ratios when allocating security personnel and resources to schools.

The BISD Police Department and Security Services should identify measures for assessing security threats at each school, including calls for service and behavior- and drug-related incidents. The BISD Police Department and Security Services should apply coverage ratios to allocate its resources among schools on an annual basis.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The chief of police develops a methodology for assessing the security threats at each school and facility in the district.	May 2003
2.	The chief of police submits the methodology to the superintendent for approval.	June 2003
3.	The chief of police evaluates security threats against coverage ratios to determine if ratios should be weighted for higher security risks.	July 2003
4.	The chief of police assigns security personnel to each school based on this methodology.	August 2003

5.	The chief of police conducts a security review each year.	Annually

FISCAL IMPACT

This recommendation can be implemented with existing resources.

FINDING

Many of the district's hall monitorsare asked to perform administrative tasks that are not security-related. Stell Middle School, for example, requires that hall monitors pick up attendance records from classrooms, clean and organize the bookroom, deliver books to teachers, deliver computers to classrooms, get ice for school parties or dances, put up the school's marquee, and deliver packages to teachers. Although the job description allows the principal or campus designee to assign additional duties to the hall monitors, those duties must be job-related.

The responsibility of the hall monitor is to maintain an effective operation for the prevention of truancy and to keep the school halls orderly. The hall monitors are staffed at the secondary schools, some of which have three monitors and others have two. The Human Resources Department decides how many hall monitors are staffed at each campus based on a staffing formula. During the 2002-03 school year, 34 hall monitors were employed by the district at an average annual salary of $12,083.

The essential duties of a hall monitor are to watch for and report irregularities such as fire hazards, security doors left unlocked and any unusual activity; regulate pedestrian traffic at the school's entrance and in halls to maintain an orderly flow; monitor the halls and surrounding school premises for truancy; check for students' hall passes and tardy slips; direct authorized visitors to their proper destination on campus and monitor unauthorized visitors; record data for the supervisory staff, such as student conflicts or unusual occurrences; report tardiness, truancies and other related incidents to the appropriate school administrator; and perform any other job-related duties as may be designed by the school principal or designee.

When used in the capacity described in the job description, hall monitors serve as a deterrent for truancy and misbehavior in the hallways.

Recommendation 100:

Ensure the district's hall monitors are being used in an appropriate capacity based on the duties outlined in their job description.

Principals and school designees responsible for the hall monitors need to ensure that any additional duties assigned to the hall monitors are strictly job-related and in line with the intended purpose of the position.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The area superintendent for Human Resources creates a memo to campus principals and assistant principles advising them of the need to ensure their hall monitors are being used in a manner consistent with the duties outlined in their job description, including examples of appropriate and inappropriate responsibilities.	March 2003
2.	The memo is distributed via district mail to all principals, assistant principles and campus administrators in the district.	April 2003
3.	The principals, assistant principals, or campus administrators in charge of assigning responsibilities to hall monitors ensure that the needs identified in the memo are met at their school.	Ongoing
4.	The chief of police commences a rotating schedule of intermittent, unannounced visits by an officer to verify that hall monitors are being used in an appropriate capacity at each campus.	Ongoing

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 12
SAFETY AND SECURITY

C. SAFETY

All students deserve a safe learning environment and district employees should be afforded a safe environment in which to work. It is the responsibility of principals, security personnel, and district administrators to collaborate in an effort to effectively manage their resources and aggressively plan for potential dangerous situations in order to ensure a safe district.

FINDING

BISD incorporates Crime Prevention through Environmental Design (CPTED) principles into construction planning. The basic premise of CPTED is that the physical environment can be changed or managed to produce behavioral effects that will reduce the rate and fear of crime, thereby improving the quality of life. The techniques employed by CPTED seek to use environmental factors to affect the perceptions of all users of a given space, addressing not only the opportunity for the crime but also perceptions of fear on the part of those who may otherwise be victims. For example, good lighting in a parking lot makes the legitimate users of the parking lot feel safe while, at the same time, it makes the illegitimate users of the same parking lot feel unsafe in pursuing criminal behaviors like theft or assault.

The Crime Prevention officer received 40 hours of crime-prevention training, part of which taught CPTED principles.The officer is able to incorporate the CPTED principles and strategies into construction planning through his involvement in the Construction Planning Committee. This committee consists of district and campus administrators, architects, custodians and administrators from the Maintenance, Facilities and BISD Police and Security Services Departments. The committee meets on an as-needed basis.

COMMENDATION

Incorporating Crime Prevention through Environmental Design (CPTED) principles into the design of new district facilities is a proactive effort by the district to ensure safe and secure schools.

FINDING

BISD is proactively taking steps to improve security with a new identification system. The district has a policy that all visitors are required to report to the main office when first arriving at a school. These visitors may include parents of students, interested citizens, invited speakers, central-staff personnel, maintenance and repair people, salesmen, representatives of the news media, students not now enrolled in school, and others.

A majority of BISD schools give visitors a sticker to wear while they are visiting the campus. Some schools, such as Lopez High School, have the name of the visitor, the date, and what student or employee they came to see. Other schools' stickers do not contain any such information-they merely say Visitor. Although it is a good practice for a school to make an effort to identify visitors, stickers are not the most effective because it is easy for someone to return to the school on subsequent days wearing the same sticker, thus making it easy to circumvent checking in at the front office. A more reliable method of identifying visitors is necessary in order for the concept to be truly effective, therefore the district has taken steps to implement a new security system.

In a November 2002 meeting with district officials, the BISD Police Department and Security Services informed the review team that a universal identification system is being considered for long-range implementation. On November 11, 2002, the district completed a magnetic identification. system at the administration. The system allows administration employees with a photo identification card to enter the administration building through any door. Employees without identification cards must use the front entrance. BISD schools, though, have not implemented this system.

COMMENDATION

The district is proactively taking steps to improve security by implementing a magnetic identification badge system.

FINDING

The district does not conduct campus security assessments to identify unsafe security practices. At Hanna High School, the district's largest school, the review team entered the campus through a gate that, according to campus administrators, is manned during school hours by a guard. At the time the review team entered there was no guard present. The review team was then able to enter the school through one of several doors throughout the campus that remain unlocked during the day, and walk around the halls without being questioned by a campus employee, security officer, or hall monitor.

Several of the district's schools have the same issue with doors being unlocked throughout the day. According to the principals, this is due to the fact that there are multiple wings at the school and locking the doors would prevent teachers and students from entering and exiting the various wings as needed throughout the day.

The district provided the review team with information regarding third-party inspections that are conducted for all campuses, facilities, and offices. However, these inspections do not provide assessments for security measures like unmanned gates, unlocked doors, and holes in fences; instead they address workplace exposure assessments like ladder-use, locking electrical tools, and extension cords.

Many school districts conduct unannounced assessments of each school in the district to inspect the physical security measures used by the schools and also develop plans to solve any problems identified as a result of the assessment. The plans detail what the problem is, how the problem can be fixed, who is responsible for fixing the problem, and how much it will cost to fix the problem. Assessments are a great way to identify problems but are only the first step in improving the physical security of each of the district's schools. Planning is the next step to ensure the assessments achieve their desired purpose.

Recommendation 101:

Complete an unannounced security assessment of each campus and develop plans to enforce better physical security measures.

The BISD Police Department and Security Services should complete a security threat assessment of each school. Each assessment should include a sliding scale rating of the various security issues, such as ease of school entry on foot and by vehicle. The chief of police should select personnel from the BISD Police Department and Security Services to conduct the assessments allowing for five assessments to take place per week. After the assessment is conducted, the school's principal should receive the findings of the assessment and then be asked to develop a plan to rectify any problems identified throughout the assessment. Finally, the chief of police should commence a rotating schedule of intermittent, unannounced visits by an officer to verify the implementation of security measures, and report each visit to the superintendent and the principal.

IMPLEMENTATION STRATEGIES AND TIMELINE

1.	The superintendent directs the chief of police to develop a security assessment to use to evaluate security risks.	March 2003

2.	The chief of police selects personnel from the BISD Police Department and Security Services to conduct the assessments.	April 2003
3.	The selected personnel from the BISD Police Department and Security Services conduct the unannounced visits.	April 2003 - June 2003
4.	The chief of police sends the completed assessments to each respective principal, and the superintendent directs the principals to enforce better basic security measures based on the findings.	July 2003
5.	The principals develop plans to enforce better security measures in their schools based on the findings of the assessment.	August 2003 - October 2003
6.	The chief of police commences a rotating schedule of intermittent, unannounced visits by an officer to verify the implementation of security measures and report each visit to the superintendent and the principal.	November 2003 - February 2004

FISCAL IMPACT

This recommendation can be implemented with existing resources.

Chapter 12
SAFETY AND SECURITY

D. DISCIPLINE MANAGEMENT

Beginning in 1995, every school district in Texas is required to adopt a student code of conduct. The code must establish standards for student behavior and must be in compliance with Chapter 37 of the Texas Education Code. Violations are punishable, depending on the nature of the violation, by in-school suspension (ISS), placement in an alternative-education program (AEP) or Juvenile Justice Alternative Education Program (JJAEP), or expulsion.

A JJAEP must be established in counties with a population of 125,000 or more. The school districts, the juvenile board, and juvenile justice systems establish the program, which falls under the jurisdiction of the Texas Juvenile Probation Commission. The program provides for the education of incarcerated youths and youths on probation. The Cameron County JJAEP is located in San Benito.

Each year, through collaboration from district and campus staff, parents, and community members, BISD publishes a *Student-Parent Handbook and Student Code of Conduct* that is printed in both English and Spanish. The handbooks are distributed to each student at the beginning of the school year. Parents are required to sign and return a form that acknowledges they understand the Code of Conduct. Student removal to the district's Alternative Education Center (AEC) is determined in a hearings process conducted by Hearings Officers. The BISD student code of conduct is divided into behaviors and consequences. The code includes standards for student conduct, as well as behaviors and consequences for general misconduct, removal from the regular educational setting, and expulsion.

TSPR surveys indicate that the majority of each group responding to the survey feel that students receive fair and equitable discipline for misconduct. **Exhibit 12-15** shows a summary of the survey results for each group.

Exhibit 12-15
Survey Responses
"Students receive fair and equitable discipline for misconduct."

Group	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response

Administrators	13.5%	54.1%	20.3%	7.4%	2.7%	2.0%
Principals and assistant principals	17.4%	78.3%	4.3%	0.0%	0.0%	0.0%
Teachers	5.7%	47.5%	7.0%	29.1%	10.8%	0.0%
Parents	21.4%	43.8%	17.0%	10.5%	5.1%	2.2%

Source: TSPR Survey Results, September 2002.
Note: While these surveys were not scientifically administered, in a random sampling of 550 teachers, 2000 parents, 700 administrators, and 70 principals and assistant principals that were sent surveys, 158 teachers, 276 parents, 148 administrators, and 23 principals and assistant principals responded. The results are included here to show the general opinion of those responding

Goals for increasing discipline management and maintaining a safe district is included in the district's annual planning process. In the 2002-03 DIP, Discipline Management/Safe Schools is one of nine areas for which goals were developed for improvement. The 2002-03 District Education Improvement Committee (DEIC) consisted of one staff member from each campus, two parents, two community members and two business representatives. The responsibilities of the DEIC responsibilities include developing, monitoring and evaluating the District Improvement Plan (DIP) as well as reviewing the Strategic Action Plan (SAP) to ensure that all activities are aligned to the goals and objectives of the DIP.

Exhibit 12-16 details the discipline management/safe schools goal and objective along with the action steps outlined to accomplish this goal.

Exhibit 12-16
BISD District Improvement Plan
2002-03

AREA: Discipline Management/Safe Schools	
GOAL: School schools will maintain a safe and disciplined environment conducive to student learning.	
OBJECTIVE: Discipline referrals will decrease by 10 percent.	
Action Step	**Timeline**

Parents will be notified of any discipline referral, as noted by the District's Student/Parent Handbook	August 2002 and as needed
A comprehensive alcohol/drug education program will be implemented in grades K- 12.	Weekly all year
Counselors will hold student support groups and group sessions on a regular basis.	Semester basis
Campus administration will provide students with conflict resolution/violence training.	Weekly
Family Counseling Centers will be maintained at 3 schools while a permanent family counseling center will be stationed at a site in the district.	3 days per week
All campus staff will receive professional development that will include the acquisition of skills in technology, special education, conflict resolution and discipline management.	District Waiver and Staff Development Days

Source: BISD District Improvement Plan, 2002-03.

FINDING

The district has an organized student appeals and expulsions system and has developed procedures to monitor the status of attendance and students taken into custody. In October 2001 the administrator for Admissions and Attendance met with district personnel responsible for safety and security and developed procedures for monitoring the status of students taken into custody by law enforcement officers. The procedures developed by the department identify key contact persons and their roles, clarify the sequence of notification, establish a communication network, and include a directory of all the key players. In addition, the district developed an expulsion packet for the hearing officer which is submitted to the Admission and Attendance Office for review a minimum of four hours prior to the scheduled hearing date and time.

COMMENDATION

BISD's Department of Admissions and Attendance has implemented a structured and well organized process to assist with student appeals and expulsions.

FINDING

The Community Youth Development (CYD) program provides activities and services aimed at reducing juvenile crime. The CYD program was

established in 1995 by the Texas Department of Protective and Regulatory Services with the purpose of developing juvenile delinquency prevention approaches in areas of the state with the highest incidence of youth crime. Fifteen areas in Texas have been selected since the program began. These areas were selected by, first, selecting the 15 counties in Texas with the highest number of juvenile arrests for violent offenses and, second, selecting the zip codes within these counties with the highest number of juvenile probation referrals.

One of Brownsville's two zip codes, 78520, is a participant in the CYD program. The program services approximately 5,000 students age 17 or younger residing in or attending school in the 78520 zip code area, as well as their families. These students and their families take part in the educational, recreational, mentoring, after-school and social, cultural and leadership skill development activities offered by the program.

BISD acts as the fiscal agent with community representation by a local steering committee. The steering committee consists of community representatives, parents, students and local law enforcement. The committee decides what programs to incorporate into the CYD program based on the services needed to prevent juvenile crime in the area. The programs are sent to the state for approval and then presented to the board. The programs currently being offered by the Brownsville CYD program are listed in **Exhibit 12-17**.

Exhibit 12-17
Brownsville CYD Programs
2002-03

Program	Description
Family and Youth Connection	Provides services to prevent youth from getting involved in juvenile crime, gang activities, violence, illegal acts, and other related activities. Includes: • ROPES course training • Peer support sessions • Community-awareness presentations
Brownsville CYD Youth Advisory Council	Helps youth that attend middle and high school based in the 78520 zip code area develop leadership skills by giving them an opportunity to address some of the problems youth are experiencing in the community.
Extended Day Program at	Focuses on chess.

Benavides Elementary	
Extended Day Program at Resaca Elementary	Focuses on sports, recreational activities and chess.
Extended Day Program at Skinner Elementary	Focuses on computer literacy and dance.
Extended Day Program at Villa Nueva Elementary	Focuses on dance, flag football, basketball, track and field, cheerleading and drill team, chess, arts and crafts and gardening.
Extended Day Program at Yturria Elementary	Focuses on chess.

Source: Community Youth Development Information Binder, 2002.

The program also has five subcontractors that provide additional programs. Each subcontractor and a description of their programs are listed in **Exhibit 12-18**.

Exhibit 12-18
Brownsville CYD Programs by Subcontractor
2002-03

Subcontractor	Program	Description
Gladys Porter Zoo	ZOOPER Kids	During the summer, children have the opportunity to explore zoo grounds; examine concepts such as camouflage, nocturnal animals, predators, prey, reptiles and amphibians; meet zookeepers; and participate in camps. Zoo camps include: • Zoo Safari Camp • Creature Feature Camp • Rainforest Discovery Camp • Jr. Zookeeper Camp
Parents Advocating for Student Success (PASS)	Vision for Change	Provides a resource center at a local church in the community that provides information, support and training to families of children that suffer from

		behavioral and emotional disorders such as Attention Deficit and Hyperactive Disorder (ADHD), Obsessive-Compulsive Disorder (OCD), depression and Oppositional Defiant Disorder (ODD).
Ramirez School of Karate	• Martial Arts for a Year • Karate Summer Camp	Provides martial arts to youth between the ages of 5 and 17 years from the 78520 zip code for a year. The Karate Summer Camp offers martial arts to the same age group during the summer in a camp setting.
Total Workout, Inc.	Fitness for Life	Provides youth between the ages of 5 and 17 years with a variety of classes designed to promote health and physical fitness which include aerobics, weight lifting, Tae-Bo, gymnastics and tae kwon-do.
University of Texas at Brownsville and Texas Southmost College	• Plus Time After School Adventure • Kid's College	The Plus Time After School Adventure project provides enrichment in the arts, organized cultural and recreational activities, conflict resolution and violence prevention curricula, and counseling. The Kid's College program offers half-day sessions during the summer that focus on varied recreational and leisure activities including arts and crafts, photography, nature/ecology, guitar, storytelling, and computers.

Source: Community Youth Development Information Binder, 2002.

The total funds allocated for the program are $500,000. Approximately $137,000 goes to administrative costs; approximately $127,000 funds the programs offered by the district; and approximately $236,000 funds the programs offered by subcontractors.

COMMENDATION

The Community Youth Development program is a proactive district effort to prevent juvenile crime.

Appendix A
PUBLIC FORUM COMMENTS

As part of Brownsville Independent School District (BISD) performance review, a public forums were held on September 3, 4 and 5. Members of the public were invited to record comments they have regarding the BISD education system. Community members and school staff who participated in the public forums gave their comments about the 12 areas under review. These comments illustrated community perceptions of BISD and do not necessarily reflect the findings or opinion of the Comptroller or review team. The following is a summary of comments received by focus area.

DISTRICT ORGANIZATION AND MANAGEMENT

- I feel that the Board of Trustees should not have the right to run the school because that is why we hired a superintendent, at $120,000 a year.
- No employee should be coerced or threatened by a Board member and it has been done to teachers because some had signed a petition because they needed help. Their morale is very very low. I wish someone would take interest in all our schools.
- The interim superintendent was served with a grand jury subpoena due to the fact that he is holding important information about two employees. Something to do with insurance and other issues.
- The school system is very well organized.
- I feel that the superintendent was unfair and unjust to our school system. One, by using unethical practices by wavering student athletes that were zoned to certain schools and directing them into one particular school where his brother in law coaches. Two, abusing his powers and using unethical hiring practices. Three, unethical practices of spending of district funds to better facilitate one nurse over others such as his wife by building her a brand new office in a brand new facility.
- I feel that the school board has done an excellent job the past six months. The new members were thrown into a tough situation and have done well. Hopefully BISD can get a school board and superintendent that can co-exist and make a long term commitment to it.
- I think the school board and the interim superintendent are doing a great job running the schools. I am glad to be in the BISD school district!
- The interim superintendent is doing a good job. A positive change was needed. A transition to go beyond our current status to rectify past violations of policy is crucial to our district.

- Board is currently running the day-to-day operation of the school district. Current administration is harassing staff for signing a petition asking for help from TEA. Board president is putting district in liability. Superintendent secretary is suing the school district. Board president wrote an affidavit on behalf of the secretary against the school district. This is, to start with, unethical, but how can he put the district in such a liability? I thought he was supposed to take care of the districts best interest. This to me sounds fishy. He continues to delay the conclusion of a fact-finding investigation against the superintendent. He took out an ad in the Brownsville Herald in May addressing voters to vote in two of the candidates. In the ad he willingly misled the public about the districts financial status, and further criticized the superintendent and staff. A clear ethical violation. He says district is in the Red. He can't give teachers but a small raise, but there is money to create an assistant athletic director for $85,000, and to give a raise to the current athletic director. He uses purchase orders to buy gold pens for the Riviera Cluster. A few years ago he bought a judge a rocking chair with taxpayer's money. He orders pastries from the aunt of his live-in girlfriend and they cost a lot of money.
- The president of the school board is an agent for Mutual of Omaha. Although he says he only sells Medicare supplements. We currently have the most horrible health insurance. This man continues to appoint himself as chair of insurance control. This is a conflict of interest. He also sells annuities. He requested public information re: employee list and their annuities. Does this not raise a red flag? He is prolonging the status of the superintendent because while the superintendent is at work the board president cannot negotiate contracts. Insurance scam - two people signed off on a million dollars of insurance POs. They were suspended.
- The board just hired the school attorney on 9/3/02 without a background check, and he was caught on 2/02 at Sanita Border Patrol checkpoint with marijuana. His case is still pending. Also the irony is that BISD has a "0 Tolerance" policy. Money is being spent foolishly - "compadre system." EX: $85,000 for an assistant athletic director, and an administrator - $90 or $95,000. No need to spend $85,000 more when we are operating in the "Red". Three months ago we had $95 million in surplus. Now we are in the "Red" according to the school board president, who refuses to bring the Fact-Finders Report to a Board Meeting and decide the fate of the superintendent, who was suspended 3 months ago and is being paid $1400 a month for doing nothing. I am frustrated by the board president's negative attitude towards the superintendent with no regards for BISD and the community.
- The majority of the board members (4) are doing all of the superintendent school management. They are running the school.

We need the real superintendent, who is knowledgeable and has a Ph.D. in the area of superintendence. The reason he was suspended, and still is, is because he tries to tell them their role. The present board president published a page long article slandering the superintendent and telling the public that we are 27 million in the red. This was way back in May during election week. How can we allow a board president to constantly lie to the community and get away with it? The board president came out on TV. saying that he does not want to release the fact-finders report. After 3 months he and another board member voted to not release the report at the last board meeting. Later, I found out that he has been holding that report for over a week. We have had the following situations with the same board members (the 4) and nothing was done to any of them: 1) softwaregate, 2) bookgate, 3) Insurance Fiasco, 4) Travelgate ... and they are still in office. Why were two allowed to return to work while they were being investigated? The interim superintendent claimed that TEA "convinced him to bring them back." Now he refuses to cooperate with the grand jury subpoena requesting important information concerning the above-mentioned individuals. In fact, one person is calling in teachers to his office who have been involved in signing a petition requesting you all to come and investigate the district.

- One lady helped a great deal this school year in regards to moving the Binder class from the outside portable to inside the building class. (Cost Palm Grove) site-based Decision Making our principal gives us the run around too much. (Palm Grove Elementary)
- We need a Board to be united not divide. There is no planning.
- We need our superintendent back on the job to lead our district education. The board members are not allowing our district to move forward, and if you are wondering why the low turn out here I am sure other campuses referenced that it is because people are afraid to speak out - these people do retaliate.

EDUCATIONAL SERVICE DELIVERY

- I am one of the favorites on this campus because I am a good comedian and keep the kids laughing always. I tell funny stories to enforce what I am teaching. I have seniors who still remember my vocabulary from when I taught them in freshmen year. Many of my kids are extremely at-risk and a few would have dropped out if it weren't for my class. I had a parent tell me today that her son would tell her everyday about my class and how fun it is and all he learned. We have a great many great teachers here. All know their fields well. I am well-liked because I do my best with what other people call the "worst", or deem incorrigible. It takes a good teacher to make the kids interested and feel good about themselves.

I make it a point to compliment as many kids as I can for I see their true beauty.

- Get out earlier from school.
- Classes not so long.
- I like the teachers here at Simon Rivera. You know they are really great people. They try to help you out in everything you need help out in. They are really down to earth and very polite. The school is one of the best in the Valley, the teachers are the ones who make it great.
- I like our mascot and our new teachers that we get every year. (Third graders at Villa Nueva Elem.) I like our motto and our gym. Instead of rules we do our responsibilities and consequences.
- The ROTC program is an excellent activity that surpasses others in the Valley.
- I think this school can really help me later on in life. It can help me manage my money, and help me to get a job in the business profession.
- I think they have good health services. Nurses work well and they do good jobs here. I think it works OK.
- One of the reasons I came to this school is because of the magnet program. I believe this school can help me in life to become a better citizen in the world to come.
- Our curriculum offers excellent opportunities to all students. Our students are offered more than we ever imagined. Sometimes these programs cannot be cost effective - but they are effective. I have not received any of this from Palm Grove. Are they supposed to inform us? I'm interested in several programs.
- At A.A. Champion - Does not participate in incentive programs such as the Book IT Club. All Pre-K programs are bilingual. Many kids such as mine are not Spanish speaking. Pre-K program is half day in many schools. It's an inconvenience for working people that do not qualify for financial assistance to pay day care as the day care charges a flat fee for all day or half. Kindergarten and Pre-K do not have assistance for teachers. The class sizes are kept at 12-16 students. Still teachers complain that they do not have time to deal with children disrupting classes with a tantrum or accident, therefore some teachers send the child to the office or counselor's office. The child misses out on a lot of the material being covered. At A.A. Champion supposedly the Kindergarten teachers all teach the same. Not true. They do not follow the same curriculum. Some give homework. Others don't. Some test for GT. Others don't. Student Discipline - I personally had a problem with this. The teacher kept complaining about my son's discipline. Sent my son to the counselor repeatedly. Kept on holding conferences with me and even met with the principal. I was told my son could not return to school to attend 1st grade if his behavior did not change. Yet they

cancelled an appointment with school person who tests for hyperactivity and never rescheduled it. I spoke to the other superintendent in order to have my son moved from class. I felt the teacher had class management problems. The principal finally agreed to change my son. My son showed 70 percent improvement in attitude and grammar, etc. My son was supposed to go to summer school. The first day of class I was called stating I needed to pick up my son due to having a fight. The teacher did not want to speak to me at first then did. My son was kicked out of summer school as a kid in his Kindergarten class who had constantly caused him problems was in the same class for the summer. My son does not know all he needs for being in the 1st grade. The campus did not have another all English summer class to have my son attend.

- Central office is good for providing information; however it lacks direction and consistency. Changes are made every year without campus input and without evaluating a program success.
- They only want intelligent kids to teach. The rest of the kids' teachers send them to Special Education. Plus if a child comes sick or abused, teachers don't want to deal with it. We never know how the performance is because teachers don't communicate with parents.
- Kids can't or won't speak English at High School level. Bilingual education does not work.

COMMUNITY INVOLVEMENT

- In my eyes, I believe the parental involvement is great. My father and mother both are very involved in my high school.
- Don't do anything to involve the parents. I have offered to volunteer and they do not want me. They say they don't need anybody. Parental involvement employees don't have any people skills. We need the participation of not only parents, but also businesses. Businesses are related to BISD.
- Palm Grove does what it can with Parental involvement. They claim budget is not enough as other schools. Could school parents meetings be after 5 p.m. so I may attend? It used to be once a month; now it's on a daily basis from 8:30 till 10:30 a.m. I cannot attend these either. A.A. Champion same as above the time allocated for school meetings is at a time not possible for many parents. Single parent's household must work 8 a.m. - 5 p.m. The school could at least send newsletter regarding these meetings. This school for example is a new school going on its second year. I for one did not receive any feedback as to PTA meetings or other meetings held regarding parental enrollment. During the school functions such as parent night or talent shows the school sold food

items, yet they always asked for contributions to do one activity or another and we never got a report as to what those funds were used for. My two kids did not go on any field trip to say that perhaps the money was used there.

PERSONNEL

- Severance pay for here in the Valley - I don't think it's enough to compensate them for the grief they have to put up from us. I'm a student.
- I think the paraprofessionals should get paid a little more or increase the wage scales a little. We are such a large district and I think we are under paid. The hiring process here is also a little difficult if you don't know somebody in the district you usually don't get hired on into the district.
- Only hire their relatives and friends. Nurses don't do anything. Teachers pay scale must be revised the same with all levels of administration. Hiring practices change consistency without notice. Recruitment, hiring, and placement of teachers are done without approval of campus-based decision making committees. Staff development is district driven not campus based or campus needs based. District waiver days are planned without input from campuses.
- Hiring Practices- who you know. Compadre system, political favors paid.

FACILITIES USE AND MANAGEMENT

- I don't like the lockers. Most of them don't work. We are here - ROTC - to help the principal during summer and a lot of them don't work.
- The restrooms are really bad. They stink.
- The restrooms stink.
- I like everything about the school except the bathrooms. The classrooms are neat and clean, so are all the halls. The building is getting a little small for all the people, but it's still okay. The cafeteria is in good condition but it's also getting a little small for all the people.
- The downstairs bathrooms (mainly) are horrible. On every stall, whether the doors aren't there or the toilets don't work. We have a nice big bathroom and we can't even use it unless we don't mind everybody watching us do our personal business. Although it is kind of crowded, it's not that bad. The school for the most part is clean, but in the girls' locker room it stinks really bad towards the middle of the year and not just because of us but there are rats everywhere and the coaches' office stinks because of the rats. I

know it happens sometimes, but last year, I found many white hairs in my tray for lunch. In appearance, the school looks nice.

- Custodial services - They are too many and they keep throwing the ball one to another and just have too much extra time.
- Bond Issue Concern - Gyms and other facilities not on schedule. Maintenance Central Offices of older facilities is not up to par. Title II concerns for extra-curricular facilities. Palm Grove Portables - could they have a walkway with roof to protect children from rain, etc? My son says one of the restrooms they use for PE is always dirty. What can be done? We spoke with the principal already - apparently nothing's been done.
- I think building schools has become a scam. Paredes Elementary should have been complete two years ago. The first construction company went under. Apparently given too many projects. The second company is still in the process of completing the school. It was found that this campus did not have lines put in for computers or phones. I was told this also happened at the previous two campuses. Is this a scam to award this contract to someone else later at a higher price? How does this happen 3 times? What is the job description of the facilities person in charge of overseeing? We expect our children to learn from mistakes. This does not sound like a mistake. The district needs appropriate nurse office facilities. Most nurses' offices are inadequate to serve the diverse health needs of out students. Most have at least two different rooms. We are required to serve children with a tube feeder, cauterization, just to name a few.
- This school, A.A. Champion, was built in an area that was a farmland. The main road to the school is not paved, has potholes and mostly it is extremely narrow. It's a back road! The people that reside along this street had their mailboxes knocked over, as they are too close to the street. For most of the year there were no sidewalks in the school from the main road. The children that walked to school had to do so between vehicles occupying the road. During the 1st couple of weeks the school buses had police directing traffic around the house. When we inquired with the city we were informed the district built in that area because the land was cheap and that it was not the responsibility of the city to move that road (Bowie) up in the list of roads to be fixed just because BISD decided to build there. The people of Brownsville's only choice was to vote for bonds in order to allocate money to expand the road. That we've heard before. When I spoke to the area school superintendent he seemed to want to get rid of me fast. He partially listened then wanted to give me a quick solution. He said he'd speak to the principal. I don't know regarding what, as he did not allow me to explain. Lastly, zoning of school. It's ridiculous for us to have to drive from one end of town to another due to zoning.

Ex: A.A. Champion is on Bowie and people living on Central Ave. are zoned for ugly. Honestly it's a better school but it's not reasonable to have to travel such a long way from home, especially with heavy traffic, and then a train crossing is in the way as well.

ASSET AND RISK MANAGEMENT

- What insurance? To insure my daughter, it costs much more than independent insurers - which she doesn't qualify for.
- My daughter has no insurance. She will not be covered until October and even then the payments are more than car payments. Something must be done.
- Health Insurance - don't get me started! Is the insurance provided by BISD really necessary for students not in athletics? The athletics department needs to insure all the participants. We need a professional to look for better insurance.
- Horrible insurance for teachers.

FINANCIAL MANAGEMENT

- A small percentage of State/Federal/Local funds are disseminated to campuses. We need more money for supplies and tutorials of students. Like any business, we see that the budget is top heavy. We have learned to make money stretch!!
- I strongly believe that the school district needs more qualified employees on the financial management department, instead of hiring their families and relatives and friends.

PURCHASING AND WAREHOUSING

- The purchasing - I believe that the BISD should lend the old books to families like me instead of not using them. And we need to be informed about future purchases before they purchase.
- Purchasing Department. Is great and the employees are awesome. Re: Competitors Bid: We have two new schools like many other districts that we're unable to use due to the mold problem. Competitive Bid seems to be sometimes not beneficial, as those that it was meant to assist have not benefited at all. It seems contractors used cheap material. When taking into consideration the lowest bid the district should not allow/settle for cheap material.
- Please check on bid and contract process. We currently have to spend millions more dollars on projects that had been bid on forward, just to finish the work.
- Lack of new and updated textbooks. I haven't seen new text books in eight years.

COMPUTERS AND TECHNOLOGY

- They are nice but the Internet access is no good. They never let you go anywhere. They have brought a lot of new computers in but there are a lot of people who need to be computer literate.
- They have provided us with lots of computers. We need a technology class that teaches us how to use them and we need TVs in each class for channel one news.
- They bought new big computers - Dell. The computers are nice. They're good. At Porter, you can get a laptop in the library. They should do that here (Riviera High School). We have Internet access but games are too controlled. Supposedly they (administration) review what we go through all the time, like the cartoon network.
- I think that the computers and technology here are good. They help us a lot when we need the Internet to look up for stuff that we need.
- The bulk of IT funds are consumed by central office. Campuses need more funding and more control over funds. Good idea to help students at early age. Good learning software. Technology is wanted and needed but is secondary to other requirements. Elementary children are the ones at an age to absorb education and computers are something they find most enjoyable and an entertaining way to learn, yet some of the new schools, i.e. A.A. Champion, do not have computer access for the Pre-K - 1st grades.
- We don't need any computers because they're not ever available to the public. We need computers after 5:00 p.m.

FOOD SERVICES

- I like this school. I like the cafeteria. I like the teachers and the education curricular program they have. I hate the smelly restrooms.
- Until this year the food is good. The restrooms smell horrible. There's not permission to go out of school at lunch.
- Go out of campus for lunch. Have better food. Make a bigger cafeteria.
- Go out of campus for lunch. Have better food, like pizza and all other places. Make a bigger cafeteria.
- Well the food here isn't all that great. Because it's the same thing everyday. Also the food is dull and not cooked well.
- Well, honest truth, the food is all right. The lunch ladies try really hard to get their food to taste as good as the real thing. The pizza tastes like paper but the macaroni is really good, and I think that they should have vegetarian meals for the vegetarians. The juice

should be bigger. The enchiladas have onion and not very many people are fans of onion.

- Food - everything is soy. The healthier they make it, the worse it is. There are random items in it. Good things - they put in ices. They also put in snack bars and they have fund raisers (pizza, candy, etc.) Raw biscuits sometimes. At the middle school, a long time ago, a biscuit broke a window.
- I don't want to elaborate but basically the majority of the food either tastes dull, bad or is not fully cooked. Sometimes you'll find misc. items within it. I have a problem that they don't serve fruits with juice.
- Well I think that the food here is not all that great. They give it everyday and the same kind all the time. It would be nice if they would have a change of food every now and then.
- Well, I think we need better food in our lunchroom because our food is not all that great.
- Well, the food isn't all that great. We need a better variety of food, and better well-cooked food. Juice should be bigger.
- The cafeteria is really nice after its remodeling makeover.
- What I like the most of the school is the cafeteria.
- I like the school, but I feel that it needs improvement. The food is OK but not as good as my middle school. Also, the thing that bugs me the most is that there is no open campus and we only have 30 minutes long for lunch after all that hard work in class. I hope they change that. Thank you.
- Schools are very bad on the food department. Children don't have too many choices and the food is terrible. Plus the parent involvement is selling a lot of food not according to the nutritional codes of the US. Ex: Hot stuff, hot Cheetos, pickles, etc. Tell me who approved this.
- Cafeteria is great - food is OK. Cafeteria is sometimes run as separate entity from rest of campus. Cafeteria food has improved since I went to school. It is more nutritious now. There are more varieties to choose from. Cafeteria is bettered organized, and most important, cleaner. My 1st grader's opinion is that the food is good.

TRANSPORTATION

- Transportation has improved 10 fold within last 3 years! We need more buses. My son does not use bus but from what I have seen it has improved a great deal. People are now respecting the loading/unloading more. BISD needs to do a drug screening every month. My cousin got drugs from a bus driver who is related to a BISD teacher. More educated drivers.

SAFETY AND SECURITY

- Pretty good discipline - a few days ago I got caught by a security guard for attempted assault. You have to have a pass in the halls - security guards ask. They come in the restroom and check. It's pretty tight - they are just trying to keep everybody safe. I just think it's pretty safe. We can't lie; we have to be straight up. We have to be thankful the security guards are here to protect us.
- The dress code bothers me.
- My concern is when my son left the campus from Vermillion Elementary without any staff knowing he had gone (five coaches were out there supervising children supposedly). They did not know until my sister called them to inform them that he was home. Another thing is that they have not replaced the hole on the grate where my son had access to leave campus. I believe that this matter should've taken action immediately after this incident.
- Good safety/discipline policies in place - implementation varies. Stronger consequences necessary from local government. Porter HS has great campus personnel, a however additional personnel is needed. No law enforcement for speeders in Palm Grove. Could 35 mph be lowered to 15 mph or 20 mph like other schools? We need classroom camera (videos) on each classroom.

Appendix B
DISTRICT ADMINISTRATIVE AND SUPPORT STAFF SURVEY RESULTS

Demographic Data

Note: Percentages may not add to 100 percent due to rounding.

While these surveys were not scientifically administered, in a random sampling of 700 administrators that were sent surveys, 148 responded. The results are included here to show the general opinion of those responding.

A. District Organization and Management

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
1. The school board allows sufficient time for public input at meetings.	4.1%	43.2%	19.6%	23.6%	8.1%	1.4%
2. School board members listen to the opinions and desires of others.	4.1%	39.2%	27.7%	23.0%	12.8%	2.0%
3. The superintendent is a respected and effective instructional leader.	8.1%	19.6%	27.7%	18.9%	23.6%	2.0%
4. The superintendent is a respected and effective business manager.	7.4%	19.6%	27.7%	18.2%	23.6%	3.4%
5. Central administration	9.5%	39.9%	12.8%	22.3%	13.5%	2.0%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	is efficient.						
6.	Central administration supports the educational process.	12.2%	49.3%	15.5%	10.1%	10.8%	2.0%
7.	The morale of central administration staff is good.	7.4%	31.8%	23.6%	21.6%	14.2%	1.4%

B. Educational Service Delivery and Performance Measurement

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
8.	Education is the main priority in our school district.	29.7%	41.2%	3.4%	17.6%	7.4%	0.7%
9.	Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	10.1%	45.3%	20.9%	18.9%	4.1%	0.7%
10.	The needs of the college-bound student are being met.	6.8%	48.6%	20.9%	20.3%	2.7%	0.7%
11.	The needs of the work-bound student are being met.	3.4%	53.4%	19.6%	19.6%	2.7%	0.7%
12.	The district has effective educational programs for the following:						

	a) Reading	19.6%	65.5%	4.1%	8.8%	0.7%	1.4%
	b) Writing	18.2%	64.2%	5.4%	10.1%	0.7%	1.4%
	c) Mathematics	18.9%	65.5%	4.7%	8.8%	0.7%	1.4%
	d) Science	19.6%	64.9%	4.7%	8.1%	1.4%	1.4%
	e) English or Language Arts	17.6%	66.9%	5.4%	8.1%	0.7%	1.4%
	f) Computer Instruction	17.6%	62.2%	5.4%	12.2%	1.4%	1.4%
	g) Social Studies (history or geography)	18.9%	60.1%	6.8%	9.5%	2.7%	2.0%
	h) Fine Arts	18.2%	58.8%	6.1%	10.1%	4.7%	2.0%
	i) Physical Education	16.9%	68.2%	6.8%	6.1%	0.7%	1.4%
	j) Business Education	14.2%	52.0%	20.3%	8.8%	1.4%	3.4%
	k) Vocational (Career and Technology) Education	14.2%	52.0%	20.3%	8.8%	1.4%	3.4%
	l) Foreign Language	17.6%	52.7%	17.6%	8.1%	1.4%	2.7%
13.	The district has effective special programs for the following:						
	a) Library Service	11.5%	52.7%	18.2%	12.2%	2.0%	2.7%
	b) Honors/Gifted and Talented Education	16.9%	59.9%	11.5%	9.5%	2.7%	0.0%
	c) Special Education	17.6%	56.8%	12.2%	9.5%	3.4%	0.7%

d) Head Start and Even Start programs	20.3%	60.8%	6.8%	8.1%	4.1%	0.0%
e) Dyslexia program	16.2%	47.3%	23.6%	8.8%	2.0%	2.0%
f) Student mentoring program	16.9%	59.5%	10.8%	8.1%	2.0%	2.7%
g) Advanced placement program	9.5%	49.3%	20.3%	17.6%	3.4%	0.0%
h) Literacy program	12.2%	55.4%	18.9%	9.5%	1.4%	2.0%
i) Programs for students at risk of dropping out of school	10.8%	52.0%	24.3%	8.8%	1.4%	2.7%
j) Summer school programs	14.2%	48.6%	16.2%	17.6%	2.7%	0.7%
k) Alternative education programs	20.3%	61.5%	6.8%	9.5%	0.7%	1.4%
l) "English as a second language" program	12.8%	58.8%	14.9%	11.5%	0.7%	1.4%
m) Career counseling program	14.2%	55.4%	16.2%	10.1%	2.7%	1.4%
n) College counseling program	13.5%	49.3%	20.3%	12.2%	4.1%	0.7%
o) Counseling the parents of students	10.1%	43.2%	26.4%	14.9%	4.1%	1.4%
p) Drop out prevention	11.5%	43.2%	15.5%	22.3%	5.4%	1.4%

	program					
14.	Parents are immediately notified if a child is absent from school.	6.8%	43.2%	21.6%	21.6%	6.1%	0.7%
15.	Teacher turnover is low.	14.2%	35.1%	12.8%	29.7%	7.4%	0.7%
16.	Highly qualified teachers fill job openings.	6.1%	34.5%	30.4%	22.3%	6.1%	0.7%
17.	Teacher openings are filled quickly.	8.8%	31.8%	18.9%	28.4%	10.8%	1.4%
18.	Teachers are rewarded for superior performance.	7.4%	32.4%	16.2%	33.1%	9.5%	1.4%
19.	Teachers are counseled about less than satisfactory performance.	7.4%	25.7%	17.6%	31.8%	16.2%	1.4%
20.	All schools have equal access to educational materials such as computers, television monitors, science labs and art classes.	2.7%	39.9%	28.4%	23.0%	5.4%	0.7%
21.	The student-to-teacher ratio is reasonable.	11.5%	46.6%	5.4%	20.3%	14.2%	2.0%
22.	Students have access, when needed, to a	8.1%	43.9%	9.5%	24.3%	12.2%	2.0%

		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	school nurse.						
23.	Classrooms are seldom left unattended.	22.3%	61.5%	7.4%	5.4%	2.0%	1.4%

C. Personnel

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
24.	District salaries are competitive with similar positions in the job market.	13.5%	43.2%	20.3%	17.6%	4.7%	0.7%
25.	The district has a good and timely program for orienting new employees.	5.4%	16.9%	14.2%	37.8%	23.6%	1.4%
26.	Temporary workers are rarely used.	6.8%	48.0%	16.9%	18.2%	8.8%	1.4%
27.	The district successfully projects future staffing needs.	2.0%	29.1%	32.4%	25.7%	8.8%	2.0%
28.	The district has an effective employee recruitment program.	2.0%	33.1%	26.4%	23.0%	12.8%	2.7%
29.	The district operates an effective staff development program.	2.7%	27.7%	33.8%	23.6%	10.1%	2.0%
30.	District employees	10.8%	51.4%	14.2%	14.9%	6.8%	2.0%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	receive annual personnel evaluations.						
31.	The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	23.0%	64.2%	3.4%	4.7%	2.7%	2.0%
32.	Employees who perform below the standard of expectation are counseled appropriately and timely.	4.7%	26.4%	21.6%	18.2%	27.7%	1.4%
33.	The district has a fair and timely grievance process.	2.7%	31.1%	23.6%	26.4%	14.9%	1.4%
34.	The district's health insurance package meets my needs.	6.8%	39.9%	26.4%	15.5%	10.1%	1.4%

D. Community Involvement

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
35.	The district regularly communicates with parents.	2.0%	15.5%	7.4%	20.3%	52.0%	2.7%
36.	The local	9.5%	54.1%	18.2%	14.2%	2.0%	2.0%

		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	television and radio stations regularly report school news and menus.						
37.	Schools have plenty of volunteers to help student and school programs.	22.3%	52.7%	7.4%	10.8%	4.1%	2.7%
38.	District facilities are open for community use.	6.1%	31.8%	15.5%	38.5%	5.4%	2.7%

E. Facilities Use and Management

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
39.	Parents, citizens, students, faculty, staff and the board provide input into facility planning.	4.7%	41.2%	27.0%	18.9%	6.1%	2.0%
40.	The architect and construction managers are selected objectively and impersonally.	4.7%	34.5%	24.3%	25.7%	10.1%	0.7%
41.	Schools are clean.	1.4%	25.7%	38.5%	15.5%	16.9%	2.0%
42.	Buildings are properly	10.8%	56.8%	6.8%	17.6%	8.1%	0.0%

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
maintained in a timely manner.						
43. Repairs are made in a timely manner.	9.5%	40.5%	8.1%	23.6%	18.2%	0.0%
44. Emergency maintenance is handled promptly.	7.4%	33.8%	11.5%	27.7%	19.6%	0.0%

F. Financial Management

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
45. Site-based budgeting is used effectively to extend the involvement of principals and teachers.	12.8%	51.4%	9.5%	12.8%	13.5%	0.0%
46. Campus administrators are well trained in fiscal management techniques.	8.8%	36.5%	31.1%	13.5%	10.1%	0.0%
47. The district's financial reports are easy to understand and read.	10.1%	33.8%	30.4%	18.9%	6.8%	0.0%
48. Financial reports are made available to community members	3.4%	26.4%	37.8%	23.0%	9.5%	0.0%

| | | when asked. | | | | | | |

G. Purchasing and Warehousing

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
49.	Purchasing gets me what I need when I need it.	2.0%	31.8%	43.2%	13.5%	8.8%	0.7%
50.	Purchasing acquires the highest quality materials and equipment at the lowest cost.	3.4%	27.7%	21.6%	24.3%	22.3%	0.7%
51.	Purchasing processes are not cumbersome for the requestor.	2.7%	27.7%	30.4%	20.3%	18.9%	0.0%
52.	The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	2.0%	18.9%	33.8%	23.6%	19.6%	2.0%
53.	Students are issued textbooks in a timely manner.	4.1%	55.4%	17.6%	14.2%	8.8%	0.0%
54.	Textbooks are in good shape.	11.5%	57.4%	16.2%	11.5%	3.4%	0.0%
55.	The school library meets student needs for books and	10.8%	60.8%	15.5%	9.5%	3.4%	0.0%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	other resources for students.						

H. Safety and Security

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
56.	Gangs are not a problem in this district.	15.5%	54.7%	12.8%	10.8%	5.4%	0.7%
57.	Drugs are not a problem in this district.	2.0%	30.4%	16.9%	37.2%	12.2%	1.4%
58.	Vandalism is not a problem in this district.	1.4%	12.2%	18.9%	48.6%	17.6%	1.4%
59.	Security personnel have a good working relationship with principals and teachers.	1.4%	16.9%	12.8%	48.6%	18.9%	1.4%
60.	Security personnel are respected and liked by the students they serve.	10.1%	56.8%	18.2%	7.4%	5.4%	2.0%
61.	A good working arrangement exists between local law enforcement and the district.	10.1%	41.2%	27.7%	13.5%	6.1%	1.4%
62.	Students receive fair	13.5%	54.1%	20.3%	7.4%	2.7%	2.0%

		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	and equitable discipline for misconduct.						

I. Computers and Technology

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
63.	Students regularly use computers.	9.5%	52.0%	16.2%	14.9%	6.1%	1.4%
64.	Students have regular access to computer equipment and software in the classroom.2%2.3%	22.3%	61.5%	4.7%	7.4%	2.7%	1.4%
65.	Teachers know how to use computers in the classroom.	21.6%	54.7%	7.4%	11.5%	2.7%	2.0%
66.	Computers are new enough to be useful for student instruction.	12.2%	51.4%	8.1%	19.6%	6.8%	2.0%
67.	The district meets students' needs in computer fundamentals.	16.2%	56.8%	8.8%	11.5%	4.7%	2.0%
68.	The district meets students' needs in advanced computer skills.	12.2%	58.8%	10.1%	14.2%	3.4%	1.4%
69.	Teachers and students have easy access to the Internet.	12.2%	45.3%	17.6%	17.6%	6.1%	1.4%

Additional Comments: District Administrative and Support Staff

- NOTE: Referent to section A: superintendent not being the current interim superintendent. BISD is not fair when it comes to their employees. The current staff consists of unlicensed supervisors while there are licensed employees in the same department. This constitutes favoritism. I am referring to the maintenance department.
- I strongly disagree with the superintendent. He gave himself a $10,000 raise, and gave his family members and close associates high paid positions with no experience. Also in maintenance there are two brothers, one was appointed by his brother to be plumbing supervisor, with no high school diploma, and plumbing license, which is required, which he doesn't have either.
- 1) Overall it is good!
  2) Better pay for support personnel.
  3) Pay scale between 1st year teacher and 20-30 year teacher is too small - more money to experienced teachers.
- The great majority of BISD employees are dedicated, and committed to providing our students with the best education possible. As a whole the district is proactive in implementing programs that help meet the needs of our students. Most of our students are at risk and struggle to master the English language. Our teacher's jobs are very challenging. They need a raise!
- We have an effective educational process at our campus. However, the Para educators are required to perform above and beyond their duties. And are seriously underpaid. Due to this many Para educators have to get second jobs to make ends meet. In turn this has cost neglect and lack of attention to our own families.
- To have better educational programs that can help our students, we have to have enough personnel to take care of their needs, other than certified personnel, there aren't enough employees (like service dept). We, the employees have to always run to take out our work. Every year, they're cutting hours, and we have to work with the same amount of students, and less people. During the summer school, only teachers and paraprofessionals have a higher salary. What about other employees, like in food service?
- I believe we need more job openings in our district for Valley people.
- #61- we have a good relationship with Brownsville police department - because of our location - we sometimes need to call the sheriff's department. The districts moral is very low over these continuing problems with the superintendent's office; transfers of principals, etc. stability is lacking in BISD.
- As a Special Education Professional for eight years, I can honestly say that this school district is in fact moving in the right direction

towards our student's education. But as any business, this district has its ups and downs.

- The lack of administrators' initiative is due to restraints from main office. Decision-making ability is not supported by the central office, therefore principals get frustrated. Before you can write a memo, make an important phone call, or contact someone, one must get clearance from the central office. This process adds to the frustration level.
- BISD is too involved in politics. Pointing fingers at others is another. I think the district should be divided. It's too big!
- I work as a paraprofessional but yet hold a BA degree. My low GPA of 2.47 is keeping me from teaching. Some administrators were recruiting teachers from the Philippines. These people have a very bad communication accent and are not well understood. I wish I were given an opportunity to teach. I am at the attendance office.
- Instead of wasting taxpayer's money on superintendents, why not let the board of trustees make all the decisions? The superintendent never makes any decisions without their approval. All he is paid for is signing on the dotted line.
- I would like to have updated computers and software to better serve the students in the program. Internet access is low. Two computers for every 10 students - the ratio is very low.
- Happy in my job. Equal opportunity for everybody. Good programs. Excellent communication (student-teacher) Need more health insurance package.
- Beginning with the superintendent, board members, and all the staff at the top (AAs, etc) they take care of them first and then everyone else. By that time there is nothing for us the classified people at campuses.
- I would like to see at least more teacher input in the board decision that effects the classroom. The classified personnel need to have more pay. Why are they not given incentives for perfect attendance? Why are the site base management committees not changed every two years? If the state test is what guides our standard, then the schools that perform should be compensated.
- Advanced technology in school is great. We have too much emphasis on the TAAS - students, and teachers are pressured too much. Teachers have to leave behind other subjects.
- There needs to be more professional approach with the children with special needs. If anything, I would like if someone would come and evaluate the situation with the regional deaf program. There is many unfair treatment with this program from the school campus administrator and other special services administrators.
- Students in high school should be better educated in reading. Students should be in a reading class in their freshman year and

continues through 11th. Until they pass the new TEKS. Students must have reading in high school.

- I would like to see more help in the area of children that are ADHD. My own child was labeled ED for three years because he needed to be in a setting with less children so he could get more one on one. I wish there was a class setting for ADHD children. There is a need. ODD (oppositional defiant disorder) is another label that the district should be more educated in. I know some teachers don't know what it is.
- Being a part of BISD as a student and a present employee has allowed me to get so much input. As a future graduate, it makes me wonder if I really want to continue being part of this district? Teachers have no desire to do the right thing, or teach, administrators who are followers than leaders. BISD lives to its compadrism reputation. Many of the high positions are not filled by the people who have the experience. Many positions are filled by family, and friends. We have lost good respected administrators, better yet leaders; because of the lack of support they receive when they try to do the right thing. Although not everything appears to be what it seems, please look into all areas, and every detail. Help us keep what good hard working and true educators we have left.
- We do a good job in spite of barriers. It seems like the district is administratively top heavy. I wish more many could be used for additional teachers, and training. Also, why aren't all employees with jobs that require advanced degrees on the same salary schedule? Some employees with a BA make more than others with MA. Where is the incentive to continue education? We should recognize students and programs that are successful and use them as models to promote improvements for others.
- There is excessive messy water where I punch in for work, it gets in my shoes. Safety and justice for all. Talk to the people in the transportation dept.
- Top admin is failing because they only care about themselves. They have no vision. A big concern with the community knows that teachers with 15 years experience will loose their jobs because they don't have a 2-year degree. Morale is very bad. I hope you mention this to the governor. Maybe he cares to help.
- I believe the campus security guards should have more training to be more alert. Some become too friendly with the students, and don't do anything when problems arise such as fights among the students.
- The possibilities of this district are endless, however due to a greedy school board who are more interested in pocketing the taxpayers money, we will never move forward. During your visit, please visit the governance practices - particularly in the areas of

bidding for insurance, construction, etc. Also I strongly feel that the board does not understand their role as policy makers and are frequently involved in the day-to-day management of the district. Please help our children. Thank you.

- It appears that our school district deals with poor principals by promoting them, and giving them a raise. Our school board does a terrible job of staying happy with the superintendents they hire. They constantly fire superintendents before their contracts are over. New schools in our district receive up to date materials and equipment such as $40,000 media retrieval systems while old schools are just now getting Internet services on campus. Too much money is being spent on poor quality materials and workmanship.
- The school board needs to leave politics aside and work together for the kids. Advancement in this district is measured by who you know, not experience or degree. When a custodian tells teachers that he is an administrator and she has to do what he says, that's bad administration.
- I hear very bad things about the school board. They should get their act together.
- The inability of BISD to hire and maintain a qualified superintendent has placed a great financial burden on taxpayers and causes a feeling of ill will in the community. Furthermore, the politics make the position less desirable for prospective candidates. Financial incentives are given out on a basis of perfect attendance, rather than actual productivity. Unfortunately the "compadre" system extends from the main office all the way into the schools. Evaluations given out annually are mostly based on who you know, not how effective you are. I say this having received almost flawless evaluation, where I know I could have done better. As a paraprofessional, I am in charge of placing orders for supplies from main warehouse. The product we receive is consistently poor.
- The security guards at the school I work at, are not highly esteemed. In fact they try to be buddies with the kids instead of earning or commanding respect. It is typical to start a school year with substitutes filling in for vacancies. Recruiting takes place in various foreign nations. How can these people teach our kids if English is their second language? It would take at least another page to write all the discrepancies. There are good teachers at BISD. I happen to work with one. Students are learning. Good things are happening. We just have a long way to go.
- The school board is too involved in the day-to-day operation of the school district. They need to let the superintendent fulfill his duties.
- Please look and investigate this district, especially the people at the highest level at the main office. They are very inefficient.

- This district needs a lot of looking into for wrong doings. I hope you do not put these surveys away and disregard what was checked off.
- The school board is not effective in supporting the superintendent or the district in doing what's right for students. Too much focus on gossip, nepotism, and crunching money to effectively remain focused on educating our students - district is not providing a multi-cultural environment - very prejudiced and biased administration is causing poor morale.
- The teachers do an amazing job of educating the students without much support from the district. The board members are too busy fighting among themselves and/or with the superintendent. They are busy with their political machines and ensuring next election. Seniority seems to reign supreme with the seniors doing little to no work and setting the example for others who will follow those who live to teach, "do", and this is reflected by the high test scores in the district. It would help the teachers and all employees of the district, to have adequate health insurance. I look forward to the day when we can have the coverage of the state employees, which we are!
- The relationship between the superintendent and the board members is a circus. Somewhere along the line everyone has forgotten about the importance of a good education for our kids.
- The suspended superintendent has allowed funds to be diverted from instruction. Employees have been subjected to retaliation when philosophies or ethics are not in agreement. His chain of command has prevented communication- to the detriment of students.
- Teachers are recruited through diverse methods. Teachers are then subjected to district wide treatment as though they are objects. The TXBESS mentor program has been piloted, but is not the philosophy of district administration. Teachers can be suspended by the accusation of a student - then not have the issue resolved for months. The majority finds favor the teacher - meanwhile the teacher suffers emotional abuse, the district loses money by the additional cost of substitutes, and the students suffer loss of instructional services.
- Our motto "all about children" is only words. " all about money and power by the higher administrative staff" is more accurate.
- BISD is supposed to be all about the children, but it has become all about the money. The administrators are only concerned about themselves and how much money they can get out of the district. The problem starts with the administrators. If they can get away with it, why can't anyone else? They need to be looked at more closely.

- I am not an administrator at present, but was an acting supervisor for a year. I believe the deaf education program is constantly discriminated against. It is not considered to be part of the real school and gets the leftovers where facilities, and materials are concerned. The children are segregated whenever possible. I specifically mention the purchasing dept. it is literally impossible to order things in BISD. This has resulted in money being returned to the state and a loss in budget for the deaf ed. Program year after year.
- Currently our district suffers from a number of problems including:
    a. Misappropriation of funds by the school board.
    b. Central office promotes by connections not competence. The compadre system is out of control.
    c. Half of the facilities are old and deteriorated.
    d. Top salaries are too high, while bottom salaries are at or below poverty level.
    e. This district needs to be thoroughly audited, and headed by the TEA (master).
- Issues such as drug problems and violence in schools needs to be addressed and given priority. I firmly believe that too many students are being introduced to drugs at the middle school level. This causes a high number of students to neglect their education and focus more on drugs.
- Administration needs improvements. Our schools need new computers. Safety training is required for all cafeteria workers. Overall BISD is an excellent place to work at.
- The primary goal for the BISD is the quality of the education.
- BISD is meeting the education needs of all students.
- On the educational side of things, BISD does very good in certain areas. Paraprofessionals are treated like second-class citizens.
- Top administrators need to have good people skills. He needs to communicate with principals, especially with the low performance schools. I worked in two different school campuses. One principal didn't communicate with her staff, and they were low performance. The other school's principal worked with his staff, and it is an exemplary school.
- Why are the support staff forced to go back to school. It should be up to the individual. There are many that are disabled, have health problems, or don't want to go back to the pressures of having to study for final exams, etc. I don't agree in this decision.
- The district is trying to do the best with the limited funding available. The student growth is very high. Their needs are very hard to meet. Some campuses are very old and hard to maintain. Funding is a major issue.
- Answers vary greatly campus-to-campus. I am very satisfied that we currently meet and continue to project needs for technology.

This is not true for other campuses. Atmosphere and cooperation is strong in my campus. Would like to see some results or benefits or even outcomes of this survey.

- There is turmoil between the superintendent and the community. Children must come first, and his philosophy doesn't go hand in hand with this. The morale district wide is very low. We have top-heavy administrators with salaries in the $90s who presently do not have the credentials to hold their positions. There should be less people at the main office, since there is site-based management.
- When you want answers. Principals get upset we speak to our system director when the principal doesn't have an answer. The purchasing dept, and the curriculum dept needs major overhauling. The superintendent didn't make himself visible, and he sat through the June high school production as if he was mad at the world. I do want to commend the present board members for trying to keep our district together. 95 percent of the educators have respect for them for trying to clean the mess that exists.
- So far I think the district is doing a good job.
- State needs to be more involved in making sure that ill-informed, self-absorbed Board of Trustees are not allowed to run the district. We have had a terrible situation in BISD for over 1 year. We need help. It has been asked that TEA intervene, and TEA has responded by playing middle of the road process that results in the state agreeing with the superintendent and the Board of Trustees. Educational performance has improved in BISD consistently over the last few years this will change soon if our political situation continues the way it is.
- BISD is suffering from a lack of guidance. There is too much politics that the benefit of the students is going down. I think each dept does their best but there is no communication between departments. The bilingual program is not well implemented and teachers worry about the TAAS test instead of teaching something for life.
- Our district is in need of strong leaders whose interest lies in education rather than themselves. Our school board and the interim administration make poor financial decisions such as giving the district athletic director a raise, and an assistant (@$80K) yet tell campus administrators there is no money to hire more teachers. The money should be placed in the classroom for instruction not into a football stadium or in the district athletic program. If we are truly in a budget crunch as this interim administration claims, then the cut backs should not impact instruction. Instruction should be the area that is preserved in fact suffering as little as possible.
- Classrooms are overcrowded with students. I have witnessed between 28-32 students to one teacher. How is it possible for my kids to learn well? Some of those students have behavior problems,

so teachers spend more time disciplining than teaching. I have witnessed this. Please help!

- This thing about sending the paraprofessionals that have been with the district 20+ years back to school sound kind of crazy, some of these people are so old, or have not gone to school for a long time that they wouldn't know what to do. That would be wrong to let them go, cause they are hard workers.

- Comptroller, first of all I want to thank you for sending us this survey, nobody has ever done it before. BISD is a wonderful district caring for its employees and trying to help us in every way they can. I have only one complaint - this is against one of the assistant superintendents, everything has to go through her office, even the simplest of memos, and she keeps them and loses them half the time. The same thing happens to requisitions, cash payments, agenda items, etc. she makes it so hard to get things done. Half the time is spent in looking for the items. Otherwise things are fine. Thanks again.

- The board of trustees and top administrators worry about themselves and not the students or employees. So many hourly employees make important decisions for professionals. "the good old boy" system operates in full force. The TEA needs to clear the district and the Board and start anew under tight supervision. We need help here to manage a district that is out of control, heading over a cliff into the ocean.

- BISD is moving forward to meet the challenge of educating our students to compete in a global economy. The administration at all levels are provided with the support and resources to supply the best professional development for our teachers to deliver quality instruction, therefore, providing success for all students. I am proud to be a part of BISD.

- BISD needs to buy high quality supplies. Students that live in poor neighborhood should have more access to computers. Salaries should be higher to high performance teachers. Employees should have better health coverage.

- Our district is too large to be effectively managed. Several elementary schools have over 1,000 students. Administration at these campuses does not effectively manage resources to maximize student achievement. These schools are on local probation. These schools need effective administration or divide the schools, or build more schools to reduce population.

- Our salaries need to be reviewed. Some levels in some dept in the main office have not been raised in over 10 years.

- The school district should do a better job in supplying the maintenance and other dept so we can perform a very good job.

- BISD is one of the best. As we all know, it takes leaders to guide everyone else into their footsteps. I believe we will keep getting better.
- BISD children are saturated with TAAS work.
- I feel BISD is doing a real good job.
- A lot of time is spent focusing on the TAAS tests at the expense of regular educational time. Also, it is discrimination to subject personnel from transportation, and maintenance depts. To random drug tests while classified personnel, which is directly involved with students, are exempt.
- 1) Fine arts should not be phased out at elementary schools. 2) More career pathways should be implemented for the high school student, e.g. psychology, counseling, etc. 3) Teaching to standardized tests, especially at the elementary level, and failing them due to pass/fail of these tests, places undue stress on the child. Very counterproductive. 4) Teachers need to remain in the classroom during the school year - not pulled from the classroom 2-3 days a week for this new program, or that new program. Children need consistency. 5) Administration needs to focus on all educational performance and stop the politics. Our district is suffering.
- In regard to "our" teachers, they are doing an excellent job.
- Children who speak English are not allowed to participate in Pre-K class. We are in USA, why do we discriminate against these children and only allow Spanish speaking children to attend? These children are being punished for speaking English. We cater to those who don't speak English and push aside those who want to learn. Staff meetings for food service and custodial employees are done in Spanish. Why are the employees not required to speak and read English? Some don't have high school degrees. Those of us born and raised here are being pushed aside. "discrimination of a different sort".
- They need to value their Custodians and pay them better, because they are the first to cover in case of an Emergency, and give First Aid.

Appendix C
PRINCIPAL AND ASSISTANT PRINCIPAL SURVEY RESULTS

Demographic Data

Note: Totals may not add to 100 percent due to rounding.

While these surveys were not scientifically administered, in a random sampling of 70 principals and assistant principals that were sent surveys, 23 responded. The results are included here to show the general opinion of those responding.

A. District Organization and Management

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
1. The school board allows sufficient time for public input at meetings.	21.7%	34.8%	4.3%	26.1%	8.7%	4.4%
2. School board members listen to the opinions and desires of others.	8.7%	30.4%	13.0%	34.8%	13.0%	0.0%
3. School board members understand their role as policymakers and stay out of the day-to-day management of the district.	0.0%	13.0%	26.1%	30.4%	30.4%	0.0%
4. The superintendent is a respected and effective instructional leader.	13.0%	30.4%	13.0%	21.7%	17.4%	4.3%

		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
5.	The superintendent is a respected and effective business manager	13.0%	26.1%	13.0%	21.7%	21.7%	4.3%
6.	Central administration is efficient.	0.0%	39.1%	8.7%	30.4%	13.0%	8.7%
7.	Central administration supports the educational process.	8.7%	60.9%	4.3%	8.7%	17.4%	0.0%
8.	The morale of central administration staff is good.	0.0%	21.7%	21.7%	34.8%	21.7%	0.0%

B. Educational Service Delivery and Performance Measurement

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
9.	Education is the main priority in our school district.	26.1%	47.8%	0.0%	21.7%	4.3%	0.0%
10.	Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	13.0%	56.5%	4.3%	21.7%	4.3%	0.0%
11.	The needs of the college-bound student are being met.	4.3%	60.9%	8.7%	21.7%	4.3%	0.0%
12.	The needs of	0.0%	52.2%	17.4%	26.1%	4.3%	0.0%

	the work-bound student are being met.						
13.	The district provides curriculum guides for all grades and subjects.	39.1%	43.5%	0.0%	17.4%	0.0%	0.0%
14.	The curriculum guides are appropriately aligned and coordinated.	26.1%	52.2%	0.0%	17.4%	4.3%	0.0%
15.	The district's curriculum guides clearly outline what to teach and how to teach it.	13.0%	60.9%	4.3%	17.4%	4.3%	0.0%
16.	The district has effective educational programs for the following:						
	a) Reading	34.8%	56.5%	0.0%	8.7%	0.0%	0.0%
	b) Writing	21.7%	52.2%	0.0%	26.1%	0.0%	0.0%
	c) Mathematics	39.1%	43.5%	0.0%	17.4%	0.0%	0.0%
	d) Science	30.4%	52.2%	0.0%	17.4%	0.0%	0.0%
	e) English or Language Arts	34.8%	56.5%	0.0%	8.7%	0.0%	0.0%
	f) Computer Instruction	13.0%	56.5%	0.0%	26.1%	4.3%	0.0%
	g) Social Studies (history or geography)	13.0%	52.2%	0.0%	30.4%	4.3%	0.0%

	h) Fine Arts	8.7%	69.6%	8.7%	13.0%	0.0%	0.0%
	i) Physical Education	21.7%	73.9%	0.0%	4.3%	0.0%	0.0%
	j) Business Education	8.7%	60.9%	21.7%	4.3%	0.0%	4.3%
	k) Vocational (Career and Technology) Education	8.7%	47.8%	30.4%	8.7%	4.3%	0.0%
	l) Foreign Language	13.0%	39.1%	39.1%	8.7%	0.0%	0.0%
17.	The district has effective special programs for the following:						
	a) Library Service	13.0%	60.9%	4.3%	17.4%	4.3%	0.0%
	b) Honors/Gifted and Talented Education	17.4%	52.2%	8.7%	21.7%	0.0%	0.0%
	c) Special Education	34.8%	56.5%	0.0%	8.7%	0.0%	0.0%
	d) Head Start and Even Start programs	17.4%	39.1%	30.4%	8.7%	4.3%	0.0%
	e) Dyslexia program	34.8%	47.8%	0.0%	17.4%	0.0%	0.0%
	f) Student mentoring program	4.3%	52.2%	21.7%	13.0%	8.7%	0.0%
	g) Advanced placement program	21.7%	43.5%	21.7%	8.7%	4.3%	0.0%
	h) Literacy program	4.3%	82.6%	4.3%	8.7%	0.0%	0.0%
	i) Programs	13.0%	60.9%	0.0%.	21.7%	4.3%	0.0%

	for students at risk of dropping out of school					
	j) Summer school programs	21.7%	69.6%	0.0%	8.7%	0.0%	0.0%
	k) Alternative education programs	4.3%	65.2%	8.7%	17.4%	4.3%	0.0%
	l) "English as a second language" program	17.4%	60.9%	4.3%	13.0%	4.3%	0.0%
	m) Career counseling program	4.3%	65.2%	13.0%	13.0%	4.3%	0.0%
	n) College counseling program	8.7%	30.4%	26.1%	26.1%	8.7%	0.0%
	o) Counseling the parents of students	0.0%	39.1%	30.4%	17.4%	13.0%	0.0%
	p) Drop out prevention program	13.0%	52.2%	8.7%	21.7%	4.3%	0.0%
18.	Parents are immediately notified if a child is absent from school.	13.0%	43.5%	8.7%	30.4%	4.3%	0.0%
19.	Teacher turnover is low.	4.3%	43.5%	17.4%	17.4%	17.4%	0.0%
20.	Highly qualified teachers fill job openings.	4.3%	39.1%	0.0%	39.1%	13.0%	4.3%
21.	Teachers are rewarded for	4.3%	8.7%	8.7%	52.2%	26.1%	0.0%

	Survey Questions						
	superior performance.						
22.	Teachers are counseled about less than satisfactory performance.	4.3%	65.2%	13.0%	8.7%	4.3%	4.3%
23.	All schools have equal access to educational materials such as computers, television monitors, science labs and art classes.	4.3%	34.8%	8.7%	21.7%	30.4%	0.0%
24.	Students have access, when needed, to a school nurse.	43.5%	56.5%	0.0%	0.0%	0.0%	0.0%
25.	Classrooms are seldom left unattended.	26.1%	60.9%	13.0%	0.0%	0.0%	0.0%

C. Personnel

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
26. District salaries are competitive with similar positions in the job market.	4.3%	26.1%	4.3%	39.1%	26.1%	0.0%
27. The district has a good and timely program for orienting new employees.	4.3%	73.9%	4.3%	13.0%	4.3%	0.0%

#							
28.	Temporary workers are rarely used.	0.0%.	47.8%	26.1%	8.7%	17.4%	0.0%
29.	The district successfully projects future staffing needs.	0.0%	34.8%	17.4%	30.4%	17.4%	0.0%
30.	The district has an effective employee recruitment program.	0.0%	39.1%	17.4%	30.4%	13.0%	0.0%
31.	The district operates an effective staff development program.	39.1%	43.5%	4.3%	13.0%	0.0%	0.0%
32.	District employees receive annual personnel evaluations.	30.4%	69.6%	0.0%	0.0%	0.0%	0.0%
33.	The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	4.3%	17.4%	4.3%	43.5%	30.4%	0.0%
34.	Employees who perform below the standard of expectation are counseled appropriately and timely.	4.3%	43.5%	13.0%	26.1%	13.0%	0.0%

	Survey Questions						
35.	The district has a fair and timely grievance process.	8.7%	73.9%	13.0%	0.0%	4.3%	0.0%
36.	The district's health insurance package meets my needs.	0.0%	17.4%	0.0%	30.4%	52.2%	0.0%

D. Community Involvement

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
37. The district regularly communicates with parents.	8.7%	78.3%	8.7%	4.3%	0.0%	0.0%
38. Schools have plenty of volunteers to help student and school programs.	0.0%	34.8%	8.7%	43.5%	13.0%	0.0%
39. District facilities are open for community use.	8.7%	43.5%	8.7%	39.1%	0.0%	0.0%

E. Facilities Use and Management

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
40. Parents, citizens, students, faculty, staff and the board provide input into facility	4.3%	39.1%	8.7%	34.8%	13.0%	0.0%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	planning.						
41.	Schools are clean.	8.7%	65.2%	4.3%	17.4%	4.3%	0.0%
42.	Buildings are properly maintained in a timely manner.	0.0%	39.1%	4.3%	30.4%	26.1%	0.0%
43.	Repairs are made in a timely manner.	0.0%	30.4%	0.0%	52.2%	17.4%	0.0%
44.	Emergency maintenance is handled promptly.	8.7%	65.2%	4.3%	8.7%	13.0%	0.0%
45.	Site-based budgeting is used effectively to extend the involvement of principals and teachers.	8.7%	47.8%	8.7%	26.1%	8.7%	0.0%
46.	Campus administrators are well trained in fiscal management techniques.	8.7%	43.5%	8.7%	21.7%	17.4%	0.0%
47.	Financial resources are allocated fairly and equitably at my school.	13.0%	65.2%	8.7%	8.7%	4.3%	0.0%

F. Financial Management

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
48. Site-based	8.7%	47.8%	8.7%	26.1%	8.7%	0.0%

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
budgeting is used effectively to extend the involvement of principals and teachers.						
49. Campus administrators are well trained in fiscal management techniques.	8.7%	43.5%	8.7%	21.7%	17.4%	0.0%
50. Financial resources are allocated fairly and equitably at my school.	13.0%	65.2%	8.7%	8.7%	4.3%	0.0%

G. Purchasing and Warehousing

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
51. Purchasing gets me what I need when I need it.	0.0%	34.8%	0.0%	43.5%	21.7%	0.0%
52. Purchasing acquires high quality materials and equipment at the lowest cost.	0.0%	17.4%	21.7%	34.8%	26.1%	0.0%
53. Purchasing processes are not cumbersome for the requestor.	0.0%	21.7%	17.4%	30.4%	30.4%	0.0%
54. The district	0.0%	52.2%	4.3%	26.1%	17.4%	0.0%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	provides teachers and administrators an easy-to-use standard list of supplies and equipment.						
55.	Students are issued textbooks in a timely manner.	30.4%	60.9%	0.0%	4.3%	0.0%	4.3%
56.	Textbooks are in good shape.	21.7%	60.9%	0.0%	8.7%	4.3%	4.3%
57.	The school library meets student needs for books and other resources.	17.4%	65.2%	4.3%	8.7%	4.3%	0.0%

H. Food Services

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
58.	The cafeteria's food looks and tastes good.	8.7%	52.2%	8.7%	21.7%	8.7%	0.0%
59.	Food is served warm.	17.4%	73.9%	0.0%	4.3%	4.3%	0.0%
60.	Students have enough time to eat.	21.7%	69.6%	4.3%	0.0%	0.0%	4.3%
61.	Students eat lunch at the appropriate time of day.	30.4%	65.2%	0.0%	4.3%	0.0%	0.0%
62.	Students wait in food lines no longer	26.1%	69.6%	4.3%	0.0%	0.0%	0.0%

		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	than 10 minutes.						
63.	Discipline and order are maintained in the school cafeteria.	30.4%	69.6%	0.0%	0.0%	0.0%	0.0%
64.	Cafeteria staff is helpful and friendly.	30.4%	60.9%	4.3%	0.0%	4.3%	0.0%
65.	Cafeteria facilities are sanitary and neat.	30.4%	65.2%	0.0%	0.0%	4.3%	0.0%

I. Transportation

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
66. The drop-off zone at the school is safe.	13.0%	60.9%	4.3%	21.7%	0.0%	0.0%.
67. The district has a simple method to request buses for special events.	21.7%	69.6%	0.0%	8.7%	0.0%	0.0%
68. Buses arrive and leave on time.	4.3%	39.1%	4.3%	39.1%	13.0%	0.0%
69. Adding or modifying a route for a student is easy to accomplish.	4.3%	39.1%	13.0%	43.5%	0.0%	0.0%

J. Safety and Security

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
70. Students feel safe and secure at school.	30.4%	56.5%	0.0%	13.0%	0.0%	0.0%
71. School disturbances are infrequent.	21.7%	65.2%	0.0%	8.7%	0.0%	4.3%
72. Gangs are not a problem in this district.	26.1%	30.4%	8.7%	30.4%	4.3%	0.0%
73. Drugs are not a problem in this district.	0.0%	34.8%	17.4%	30.4%	17.4%	0.0%
74. Vandalism is not a problem in this district.	0.0%	30.4%	17.4%	26.1%	21.7%	4.3%
75. Security personnel have a good working relationship with principals and teachers.	21.7%	56.5%	13.0%	8.7%	0.0%	0.0%
76. Security personnel are respected and liked by the students they serve.	17.4%	56.5%	13.0%	13.0%	0.0%	0.0%
77. A good working arrangement exists between local law enforcement and the district.	26.1%	60.9%	4.3%	8.7%	0.0%	0.0%
78. Students	17.4%	78.3%	4.3%	0.0%	0.0%	0.0%

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
receive fair and equitable discipline for misconduct.						
79. Safety hazards do not exist on school grounds.	4.3%	56.5%	4.3%	21.7%	13.0%	0.0%

K. Computers and Technology

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
80. Students regularly use computers.	21.7%	56.5%	4.3%	13.0%	4.3%	0.0%
81. Students have regular access to computer equipment and software in the classroom.	30.4%	43.5%	4.3%	17.4%	0.0%	4.3%
82. Computers are new enough to be useful for student instruction.	26.1%	56.5%	0.0%	17.4%	0.0%	0.0%
83. The district meets student needs in computer fundamentals.	13.0%	56.5%	4.3%	21.7%	4.3%	0.0%
84. The district meets student needs in advanced computer skills.	8.7%	43.5%	17.4%	26.1%	4.3%	0.0%
85. Teachers know how to use computers	8.7%	52.2%	4.3%	30.4%	4.3%	0.0%

	in the classroom.						
86.	Teachers and students have easy access to the Internet.	21.7%	65.2%	4.3%	4.3%	4.3%	0.0%

Additional Comments: Principal and Assistant Principal

- The district should implement performance-based incentives (extra pay) based on efficiency and achievement levels achieved by students on state standardized tests.
- The school board should stop trying to meddle in day-to-day operations and micro manages everything that goes on in the district. The conflicts between the superintendent and the board are completely political and counterproductive.
- The district needs to stop inflating the salaries of under qualified central office administrators and give the money to the campuses where it is really earned!
    1. Concerns which affect the BISD educational performance: School board vs. superintendent: The school board and superintendent have been constantly bickering which has created serious problems in carrying out the educational processes.
    2. Upper management:
       The second-guessing and threats of reassignment has interfered with upper management being able to carry out their duties. Several reassignments were reversed.
    3. Employment policy:
       In several instances where clearly unqualified people have been placed in positions of high pay and responsibility and they have not performed well.
    4. Retention of poor performers:
       The district's policy of retaining teachers and administrators who have performed at an unsatisfactory level is costly, demoralizing, and causes great inefficiency. Once hired by BISD - never fired for poor performance (ex: teacher placed from one campus to another campus)
    5. The "compadre" system rides again:
       We are seeing a return to the process of filling positions based on friendships and connections rather than seeking the best qualified people in the open market.
    6. The future:
       The "Gear-Up" program, and JASON project are very promising.
- I strongly feel that our school has made continuous gains in the area of student performance (academically). Students reflect more rigorous courses, higher expectations and goals.
- I believe a safety hazard does exist as we have averaged three diagnoses of cancer a year in the last two years. Two deaths due to cancer on an average over the last two years, and a new diagnosis of cancer this summer.
- All value teachers and paraprofessionals.

- I believe that the individual schools are doing a good job. I, however, strongly believe that the central administration personnel are being micromanaged by the school board. The interim superintendent together with the board president and several other board members are on a witch-hunt, and are misleading the public, and teachers on issues such as personnel and budget. The board needs to stop its micromanagement! It's totally out of hand! Please help!
- Current BISD board is much better than in the previous three to five years. BISD in general is doing a good job considering geographic location and tax base.
- District staff development is excellent.
- Maintenance for 50 schools is disorganized and ineffective.
- Computer technology differs from campus to campus.
- Too much money is wasted on central office administrators who have "suspect" positions.
- Our bus transportation dept has improved vastly in the last three years, however too many buses are running routes with few students aboard.
- Our curriculum department provides little direction for the money.
- Some central office specialists should return to the (field) campus.
- Our districts educational goals overall have been accomplished. If the school board and the top administrators could learn to work collaboratively our district would be much better off. Our campus is successful because we don't meddle in main office politics. Our focus is solely on the students being happy, safe and educationally successful.
- The assistant secretary is doing a great job. As a trustee he brings practicality, and is a good role model.
- Our educational performance in BISD has improved dramatically over the years. Our teachers have worked very hard to meet or exceed all expectations. Major difficulties continue to plague this district with the in-house fighting between the board and the superintendent. This has created problems as central office administration constantly gets moved around due to changes. The departments at central office such as purchasing, personnel, and maintenance that are not supportive for principals and make too many obstacles to accomplish for our communities.
- Although there are a number of educational specialists at central office, they rarely come to help at the campus. When asked they say their role is to do staff development to a few trainers. There are too many at the central office with high salaries and those at the campus have all the load and low salaries with all the responsibility. When salaries and personnel are allotted they go to the secondary not the elementary schools. They have to "make do".

Some elementaries have over 1000 students and not enough personnel to be "safe" and "workable".

Appendix D
TEACHER SURVEY RESULTS

Demographic Data

Note: Percentages may not add to 100 percent due to rounding.

While these surveys were not scientifically administered, in a random sampling of 550 teachers that were sent surveys, 158 responded. The results are included here to show the general opinion of those responding.

A. District Organization and Management

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
1. The school board allows sufficient time for public input at meetings.	8.2%	26.6%	24.7%	29.7%	8.9%	1.9%
2. School board members listen to the opinions and desires of others.	6.3%	28.5%	17.1%	38.0%	8.2%	1.9%
3. School board members work well with the superintendent.	1.3%	5.7%	21.5%	27.8%	41.8%	1.9%
4. The school board has a good image in the community.	3.2%	13.9%	10.1%	42.4%	29.7%	0.6%
5. The superintendent is a respected and effective instructional leader.	5.1%	19.6%	22.8%	23.4%	28.5%	0.6%
6. The superintendent	6.3%	15.8%	28.5%	22.2%	24.7%	2.5%

	Survey Questions						
	is a respected and effective business manager.						
7.	Central administration is efficient.	3.2%	34.8%	14.6%	29.1%	17.7%	0.6%
8.	Central administration supports the educational process.	7.6%	51.9%	10.1%	17.1%	11.4%	1.9%
9.	The morale of central administration staff is good.	3.2%	27.8%	31.0%	22.8%	14.6%	0.6%

B. Educational Service Delivery and Performance Measurement

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
10. Education is the main priority in our school district.	23.4%	47.5%	3.2%	19.6%	5.1%	1.3%
11. Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	10.8%	46.2%	8.2%	23.4%	8.9%	2.5%
12. The needs of the college-bound student are being met.	10.8%	47.5%	17.7%	17.1%	6.3%	0.6%
13. The needs of the work-bound student	8.9%	44.9%	21.5%	22.2%	0.6%	1.9%

	are being met.					
14.	The district provides curriculum guides for all grades and subjects.	25.9%	58.2%	3.8%	8.2%	1.9%	1.9%
15.	The curriculum guides are appropriately aligned and coordinated.	19.0%	51.9%	7.6%	15.8%	3.2%	2.5%
16.	The district's curriculum guides clearly outline what to teach and how to teach it.	15.2%	48.7%	7.6%	24.7%	2.5%	1.3%
17.	The district has effective educational programs for the following:						
	a) Reading	20.9%	62.7%	3.8%	12.0%	0.6%	0.0%
	b) Writing	14.6%	58.2%	6.3%	17.7%	1.3%	1.9%
	c) Mathematics	21.5%	63.9%	3.2%	9.5%	1.3%	0.6%
	d) Science	16.5%	58.2%	5.7%	14.6%	5.1%	0.0%
	e) English or Language Arts	14.6%	67.1%	4.4%	12.7%	1.3%	0.0%
	f) Computer Instruction	15.8%	56.3%	10.8%	14.6%	1.9%	0.6%
	g) Social Studies (history or geography)	12.0%	53.2%	8.9%	20.3%	5.7%	0.0%
	h) Fine Arts	12.7%	55.7%	10.8%	15.2%	5.1%	0.0%
	i) Physical	19.0%	59.5%	9.5%	9.5%	2.5%	0.0%

	Education						
	j) Business Education	8.9%	46.8%	34.8%	7.6%	1.3%	0.6%
	k) Vocational (Career and Technology) Education	12.7%	44.3%	32.9%	7.6%	2.5%	0.0%
	l) Foreign Language	12.0%	46.8%	27.8%	8.2%	3.2%	1.3%
18.	The district has effective special programs for the following:						
	a) Library Service	12.0%	59.5%	12.7%	11.4%	4.4%	0.0%
	b) Honors/Gifted and Talented Education	18.4%	55.1%	6.3%	13.3%	5.7%	1.3%.
	c) Special Education	23.4%	57.0%	7.6%	7.6%	3.8%	0.6%
	d) Head Start and Even Start programs	12.0%	50.0%	32.9%	3.8%	1.3%	0.0%
	e) Dyslexia program	20.3%	60.1%	9.5%	7.0%	2.5%	0.6%
	f) Student mentoring program	9.5%	52.5%	24.1%	9.5%	4.4%	0.0%
	g) Advanced placement program	13.3%	57.0%	19.0%	7.0%	3.8%	0.0%
	h) Literacy program	10.8%	50.6%	25.3%	8.9%	3.8%	0.6%
	i) Programs for students at risk of dropping out of school	12.0%	51.3%	15.8%	15.2%	5.1%	0.0%

	j) Summer school programs	16.5%	62.7%	12.0%	5.7%	2.5%	0.6%
	k) Alternative education programs	9.5%	54.4%	19.0%	10.1%	4.4%	1.9%
	l) "English as a second language" program	12.7%	52.5%	10.8%	15.2%	6.3%	1.9%
	m) Career counseling program	9.5%	34.2%	31.6%	20.3%	3.2%	1.3%
	n) College counseling program	8.9%	33.5%	34.2%	19.0%	3.2%	1.3%
	o) Counseling the parents of students	6.3%	29.1%	23.4%	31.0%	7.6%	2.5%
	p) Drop out prevention program	8.9%	38.6%	29.1%	17.1%	5.1%	1.3%
19.	Parents are immediately notified if a child is absent from school.	13.9%	44.3%	10.8%	21.5%	7.0%	1.9%
20.	Teacher turnover is low.	5.1%	29.7%	25.9%	27.2%	10.1%	1.9%
21.	Highly qualified teachers fill job openings.	5.7%	32.3%	17.1%	35.4%	8.2%	1.3%
22.	Teacher openings are filled quickly.	5.7%	34.2%	11.4%	39.2%	7.6%	1.9%
23.	Teachers are rewarded for superior	5.1%	12.0%	11.4%	43.7%	25.3%	2.5%

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
performance.						
24. Teachers are counseled about less than satisfactory performance.	5.1%	41.8%	22.8%	23.4%	5.7%	1.3%
25. Teachers are knowledgeable in the subject areas they teach.	11.4%	56.3%	15.2%	12.7%	2.5%	1.9%
26. All schools have equal access to educational materials such as computers, television monitors, science labs and art classes.	6.3%	25.3%	10.1%	39.2%	17.7%	1.3%
27. The student-to-teacher ratio is reasonable.	5.1%	42.4%	3.8%	35.4%	12.0%	1.3%
28. Classrooms are seldom left unattended.	17.1%	61.4%	5.7%	11.4%	3.2%	1.3%

C. Personnel

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
29. District salaries are competitive with similar positions in the job market.	1.9%	17.7%	8.2%	43.0%	27.8%	1.3%
30. The district has a good and timely	12.7%	59.5%	13.9%	10.1%	1.9%	1.9%

	program for orienting new employees.					
31.	Temporary workers are rarely used.	3.8%	19.6%	31.0%	38.0%	6.3%	1.3%
32.	The district successfully projects future staffing needs.	7.0%	25.9%	33.5%	26.6%	5.7%	1.3%
33.	The district has an effective employee recruitment program.	5.1%	25.9%	34.8%	25.9%	7.0%	1.3%
34.	The district operates an effective staff development program.	8.2%	43.0%	10.8%	29.1%	7.6%	1.3%
35.	District employees receive annual personnel evaluations.	34.8%	59.5%	2.5%	1.9%	1.3%	0.0%
36.	The district rewards competence and experience and spells out qualifications such as seniority and skill levels needed for promotion.	5.7%	19.6%	17.7%	34.8%	21.5%	0.6%
37.	Employees who perform below the standard of expectation	6.3%	36.1%	25.9%	24.7%	7.0%	0.0%

	Survey Questions						
	are counseled appropriately and timely.						
38.	The district has a fair and timely grievance process.	5.7%	43.7%	32.3%	11.4%	5.7%	1.3%
39.	The district's health insurance package meets my needs.	1.3%	10.1%	7.6%	22.8%	57.6%	0.6%

D. Community Involvement

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
40. The district regularly communicates with parents.	10.1%	53.8%	12.0%	21.5%	2.5%	0.0%
41. The local television and radio stations regularly report school news and menus.	20.3%	66.5%	2.5%	7.0%	3.8%	0.0%
42. Schools have plenty of volunteers to help student and school programs.	5.7%	29.1%	13.9%	39.9%	11.4%	0.0%
43. District facilities are open for community use.	8.2%	44.9%	24.1%	17.1%	5.7%	0.0%

E. Facilities Use and Management

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
44. The district plans facilities far enough in the future to support enrollment growth.	4.4%	44.9%	14.6%	28.5%	7.0%	0.6%
45. Parents, citizens, students, faculty, staff and the board provide input into facility planning.	4.4%	30.4%	19.6%	35.4%	10.1%	0.0%
46. The architect and construction managers are selected objectively and impersonally.	3.8%	14.6%	48.7%	20.9%	10.8%	1.3%
47. The quality of new construction is excellent.	2.5%	17.1%	18.4%	41.1%	20.3%	0.6%
48. Schools are clean.	6.3%	63.9%	5.1%	17.1%	7.6%	0.0%
49. Buildings are properly maintained in a timely manner.	4.4%	52.5%	5.7%	26.6%	10.8%	0.0%
50. Repairs are made in a timely manner.	3.8%	32.9%	7.6%	42.4%	13.3%	0.0%
51. Emergency	5.1%	52.5%	14.6%	20.9%	7.0%	0.0%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	maintenance is handled promptly.						

F. Financial Management

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
52.	Site-based budgeting is used effectively to extend the involvement of principals and teachers.	7.0%	40.5%	15.8%	23.4%	11.4%	1.9%
53.	Campus administrators are well trained in fiscal management techniques.	8.2%	43.0%	24.1%	18.4%	4.4%	1.9%
54.	Financial resources are allocated fairly and equitably at my school.	7.0%	32.3%	12.7%	29.7%	17.1%	1.3%

G. Purchasing and Warehousing

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
55.	Purchasing gets me what I need when I need it.	3.2%	24.7%	15.2%	39.2%	15.8%	1.3%
56.	Purchasing acquires the highest quality materials and equipment at	3.2%	26.6%	24.1%	28.5%	16.5%	1.3%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	the lowest cost.						
57.	Purchasing processes are not cumbersome for the requestor.	1.9%	25.9%	29.1%	24.7%	15.2%	3.2%
58.	Vendors are selected competitively.	4.4%	30.4%	39.9%	15.8%	8.2%	1.3%
59.	The district provides teachers and administrators an easy-to-use standard list of supplies and equipment.	8.2%	52.5%	10.1%	17.7%	10.8%	0.6%
60.	Students are issued textbooks in a timely manner.	11.4%	62.7%	5.1%	12.7%	7.6%	0.6%
61.	Textbooks are in good shape.	8.9%	65.2%	3.2%	12.7%	9.5%	0.6%
62.	The school library meets the student needs for books and other resources.	12.7%	55.1%	2.5%	20.3%	8.2%	1.3%

H. Food Services

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
63. The cafeteria's food looks and tastes	7.0%	46.2%	7.6%	24.1%	14.6%	0.6%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	good.						
64.	Food is served warm.	8.9%	70.3%	1.9%	11.4%	7.0%	0.6%
65.	Students eat lunch at the appropriate time of day.	9.5%	69.6%	2.5%	13.9%	3.2%	1.3%
66.	Students wait in food lines no longer than 10 minutes.	10.1%	64.6%	5.1%	14.6%	5.1%	0.6%
67.	Discipline and order are maintained in the school cafeteria.	10.8%	69.6%	2.5%	11.4%	5.1%	0.6%
68.	Cafeteria staff is helpful and friendly.	19.6%	65.8%	2.5%	7.6%	3.8%	0.6%
69.	Cafeteria facilities are sanitary and neat.	20.9%	71.5%	1.9%	3.8%	0.6%	0.6%

I. Safety and Security

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
70.	School disturbances are infrequent.	8.9%	58.2%	7.0%	21.5%	4.4%	0.0%
71.	Gangs are not a problem in this district.	8.9%	27.2%	17.1%	36.7%	10.1%	0.0%
72.	Drugs are not a problem in this district.	2.5%	14.6%	15.2%	51.3%	16.5%	0.0%
73.	Vandalism is	3.2%	15.2%	10.8%	55.1%	15.8%	0.0%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	not a problem in this district.						
74.	Security personnel have a good working relationship with principals and teachers.	9.5%	57.0%	22.2%	10.1%	1.3%	0.0%
75.	Security personnel are respected and liked by the students they serve.	6.3%	46.8%	27.2%	16.5%	2.5%	0.6%
76.	A good working arrangement exists between local law enforcement and the district.	5.7%	66.5%	18.4%	8.2%	0.6%	0.6%
77.	Students receive fair and equitable discipline for misconduct.	5.7%	47.5%	7.0%	29.1%	10.8%	0.0%
78.	Safety hazards do not exist on school grounds.	3.2%	35.4%	14.6%	38.0%	8.2%	0.6%

J. Computers and Technology

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
79. Students regularly use computers.	15.8%	57.6%	4.4%	18.4%	3.8%	0.0%

80.	Students have regular access to computer equipment and software in the classroom.	12.7%	51.9%	6.3%	23.4%	5.7%	0.0%
81.	Teachers know how to use computers in the classroom.	7.6%	53.8%	8.2%	24.7%	5.7%	0.0%
82.	Computers are new enough to be useful for student instruction.	13.9%	57.0%	6.3%	17.1%	5.7%	0.0%
83.	The district meets student needs in classes in computer fundamentals.	12.7%	55.7%	5.7%	20.3%	5.7%	0.0%
84.	The district meets student needs in classes in advanced computer skills.	10.8%	42.4%	12.0%	29.1%	5.7%	0.0%
85.	Teachers and students have easy access to the Internet.	13.9%	61.4%	3.2%	15.2%	6.3%	0.0%

Additional Comments: Teachers

The following comments convey the district teachers perceptions of Brownsville Independent School District and do not reflect the findings or opinions of the Comptroller or review team. The narrative comments are the actual comments received.

- It could be better!
- Excellent!
- Money is wasted at the administration level. Summer programs waste money - too many teachers. Students are fed, and when ordering teachers take the excess food. Teachers sit around doing nothing at $35 an hour. No one checks. Grant dollars are also wasted.
- I feel that there are deep rooted problems with a school distinct this size. We are too top heavy. There are too many administrators with too many secretaries who have lost touch with the reality of the classroom working at the "glass palace" churning out paper work to justify their jobs and salaries. These administrators (many promoted by means of the "Peter Principal") also create paper work for the teachers, paper work and reports that do not create better teachers or better students. There are too many board members who have political and economic interests and who can't help but be corrupt with decisions they make for BISD, the largest business in south Texas. We need a check and balance system like the federal government has. Unfortunately, their (administrators and board members) interests prevent students from getting the best technology and teachers form receiving the best training and equipment to keep up with this rapidly changing world. No, money is not reaching the classroom the way it should, and it never will as long as we keep building administration that impedes the educational process and that does not encourage teachers financially. I have too many other concerns. I feel frustrated because I still do not have a computer with Internet service in my classroom. I choose to stay in the classroom because my conscience would not allow me to cheat taxpayers and students by working in a meaningless administrative position. Ask the employees in administration how their jobs directly affect the students educational process. If they can't give you a clear answer, send them back to the classroom.
- Last year the staff was motivated by the superintendent for the first time. The teachers felt the momentum till the school board decided their agenda conflicted with the superintendent's view of actually working hard for students. He was put on probation. Maybe someone can step in and keep the superintendent.

- BISD has the ability to be an outstanding district. I believe that not all schools are allocated the same resources. Principals and the school board should request more feed back and input from the teachers whom their decision will affect. Middle schools need more variety as far as elective choices. Besides using a "need basis" to make decisions or grant request, seniority should also carry some weight. Principals should not be made to select teachers from the pool when they have already selected (hired) people for the positions.
- The educational performance is adequate. However, personnel and students morale suffers because in this district they only hire close friends and relatives of the board for administrative positions. Check the figures, you will be SHOCKED. What ever happened to the nepotism law?
- Our school is not site based. Principal controls everything, especially the money.
  2) Teachers need a raise. Too much work, not enough time to plan.
  3) Need one hour for lunch.
  4) Need better health insurance plan.
  5) Library not adequate.
  6) More computer training for teachers/students.
  7) More early childhood programs.
- Too many board members have personal objectives and agendas and fail to meet the real needs of educating children. I personally know of five instances where BISD personnel were demoted or reassigned because board members children were involved. This needs to stop. Many times board members children go to private schools to get better education. What does this say about their faith in the system they are elected to represent?
- My concern is with the at-risk campus. I believe teachers should be given a budget no matter how small, to purchase supplies and educational materials for their subject area. The at-risk student varies from one campus to the other. Some campuses allocate a budget to teachers, while others don't.
- Overall the educational performance of BISD has been good with children in regular education. However, students receiving special education need to first be subjected to what is also offered to those students in regular education.
- I have received positive efforts on the part of veteran teachers and administration at my campus to meet needs of all students.
- Most classrooms have one computer. Half of the computers are outdated, and many teachers are not computer literate.
- Too much money is being spent on the LEI program. The success of this program should be evaluated. LEI produces phonic readers which mimic and repeat many rules that the majority of bilingual pupils do not comprehend. Comprehension in reading is the

biggest problem in our schools. LEI and FOSS science are being pushed on us and do not produce results.

- BISD board is composed of individuals that make the wrong decisions. In many cases, they overlook the real situation and look at the one that best fits their needs. The interim superintendent is strong and will make a positive impact on this district. He can persuade the board to make the right decisions. The board made a wrong decision by turning down a grant of $100,000 that was going to be awarded to a middle school. The president voted against it.
- BISD has come of age but still lacks the strong foundation needed for all members involved. All stake holders need to have some sort of input in decision that regard our community. Organizational climate is sometimes unwelcoming. Administration/teachers/counselors need to be instructional leaders, not overpaid secretaries.
- We are the fantasizing, implementing "Anglo" performance / culture on Hispanic speaking students. Textbooks and all resources are based on the Anglo culture and standards. Therefore most students 20/25 cannot relate to subjects taught as they have neither the background knowledge nor the vocabulary to comprehend to learn effectively for TEKS or TAAS testing scoring criteria. This is unfair and unreasonable as our students are much brighter than the test scores reveal. We need to have students speaking English in 2 years. We need small classes (15) and 1.5 hours of instruction to teach for learning comprehension what regular USA students learn in 20 minutes due to lack of textbook vocabulary and diversity in their daily lives.
- The administration staff in personnel (certified) should work on a much better process for working with BISD teachers and staff. They are often busy and hectic.
- More elective classes should be brought back to middle schools, cooking, shop, office management, and etiquette, industrial arts, homemaking, management, vocational sewing/design, all of these for both boys and girls. Discipline problems would lessen, self-esteem and confidence would improve and reading, math, English can still be emphasized.
- BISD is a great school district but the board is not willing to pay adequate salaries for top administrators who are qualified. The board makes recommendations to the administration not the other way around. Administrators are not paid enough.
- Personnel department needs to improve. Teacher applications are neglected and take forever to clear, so they go to other districts. They have enough staff, but the process is very slow.
- I feel the educational performance of BISD is excellent due to teacher dedication and pride taken in our work, not because of the

administration. Teachers often spend money from their own pockets to get supplies, since purchasing doesn't supply what is needed. Sometimes they will buy and send over things we didn't ask for, which we don't have any use for. I also think that we need a strong gifted and talented honors program, it seems that the at-risk students get everything, and these students are being left out. I feel there is no challenge for them to prepare for college.

- We will begin the new year with an interim principal. Our SBDM was trained to interview principals. The day before our first meeting with candidates we were told that we would not participate. "Technically" our school doesn't have a vacancy for a principal. This is all due to turmoil between the school board and our superintendent. I feel that the school board wants to run the district and hand pick relatives for high paying positions. The suspended superintendent may not be perfect, but he has the best interest of teachers and students at heart. The board members are power hungry, and they are very free with district funds. They keep paying off superintendents while our salaries remain the same, and insurance costs skyrocket!
- We achieved 100 percent in reading, writing and math in 4th, and 5th grades. We need to concentrate on teaching and not bickering.
- Teachers and principals carry all the burden of educating students
- BISD is too large and widespread. It should be divided into 2 districts.
- I feel that if BISD spent more time on the education of all children instead of their personal agendas as it is now with our board members, then more effective teaching and learning would be taking place.
- The mold situation was addressed quickly and intelligently, but why was it allowed to get out of control in the first place?
- There is an enormous waste of food in the cafeterias because students don't like the food.
- BISD is an excellent place to teach. The standards are high. The culture is rich, and the heritage means a lot to Brownsville people. Central office needs to expand. New schools should be built. Population growth is rapid in this area.
- The educational performance has increased steadily as shown by TAAS scores. If the standards were set for all the grades in the form of a state adopted test, we could see our students excel even more. There would, also, be more of a state alignment for all grades.
- Modify EXCET standards so that teachers don't have to be imported to meet the needs of the students.
- BISD is student centered. We have a fine staff.
- The food is high in fat.
- We are weak in teaching. Most teachers don't have certifications.

- There are many studies that conclude that students at all grade levels do better in critical thinking skills, analysis, outside the box solutions to problems and carry these skills into all educational disciplines. Yet here in BISD elementary schools are rarely involved in fine arts. We need qualified art teachers on every campus.
- BISD is a great district to work. But the wages, and insurance are not up to par with the rest of the country.
- Programs for at-risk students are poorly funded.
- Par one applies to the interim superintendent.
- Computers are not updated at the same time. Is this by design?
- Programming is not offered. Big mistake.
- The office should call the parents, not the teacher.
- Junior highs are dropping the ball in math and English.
- Paperwork is more important.
- More business classes should be offered.
- Insurance - health - don't get sick at BISD, insurance is not the best.
- Summer school opportunities for elementary PE teachers is very limited. We are not given an opportunity to earn extra money.
- Too many non certified teachers.
- ACP used too extensively
- Teachers are not assigned to the best extent (as per certificate).
- The biggest problem at BISD: the school board. They need to learn conflict resolution.
- Our schools are too large. No quality of education.
- Administrators are paid too much. They have no people skills. Too much stress placed on teachers.
- Nepotism and favoritism make working conditions at BISD unsatisfactory. There is prejudice. Hispanics against Anglos, and African Americans - makes progress difficult. Children are not given the best teachers for their needs because it's all based on patronization, and subservience. Teachers with the highest credentials are overlooked in favor of a principal's personal agenda. Some of the best teachers have left the district because of unprofessional treatment. Students are not respected. Low income students are not given the best opportunities available.
- I feel the emphasis is on getting the student through. We keep passing the students along because it might hurt their self- image to have a failing grade. If a teacher has the nerve to expect students to meet minimum goals (TEKS) he is rewarded with terrible schedules, and overloads, as well as a number of meetings with administrators that suggest he should not expect so much. We produce students who don't have a chance to succeed anywhere but south Texas.

- The unity in our instructional leadership was very weak. Everything became a personal issue. We need a strong leader to motivate us.
- I love working for BISD, but our school is so old; it needs many improvements.
- Money is wasted on staff development. It is poorly planned and redundant. I had to attend training, which was in Spanish. I don't understand Spanish! What a waste of my time and how insulting!
- We are very top heavy. Too many overpaid execs at the top that are unnecessary. This district needs to run like a business. There is too much scandal. Top people abuse their power. insurance is a slap in teachers' faces.
- The district should offer uncertified teachers in-service or extensive training involving EXCET exams. We don't have time to prepare ourselves, we're already too busy. I am a good teacher, all my students except one, passed the TAAS with high scores.
- Too bad I invested in ACP. I didn't learn much other than how to do lesson plans, and presentations.
- If the school board would get out of the day-to-day operations of the district, we probably have better salaries, better health insurance, and a well-respected ISD.
- Our district went through a lot of turmoil during the fall 2001 semester and part of the spring 2002 semester with problems from school board, and superintendent. It was awful, ridiculous, and in the eyes of the valley, BISD was the soap opera of the time. The educational performance was not affected, because we have excellent teachers. But morale is low. The interim superintendent is excellent, and things seem to be running in an excellent fashion, and it feels good.
- I think that the school board is working much better.
- Students are not the primary focus. Too many frivolous lawsuits by parents and members of the board. Too much paperwork by teachers to protect the administrators. Need for financial support to purchase science equipment. Administrators need to help those departments having greater needs - possibly by writing grants.
- Not enough teacher support by board, administrators, community. Teachers have to supply too many supplies from their own pocket. Purchasing department is too slow - three month for a requisition. We have a poor health insurance policy. Need higher salaries.
- The school board is an embarrassment to Brownsville. The insurance plan is horrendous and of all injustices, I believe the teacher salaries are the worst.
- The school where I work has a mold problem. We have been in portable buildings since January 2002 - nothing has been done. There is talk about building middle school number 11, however, they should first finish cleaning our school. The portable buildings

are not very efficient, electricity goes off often, and there are no covered walkways - terrible in rain and cold weather. How long will this last. The original buildings are very nice and new. The district needs to move and finish this project fast. We are largest middle school (population wise), but we don't have a real school. What a shame. There is no gym, no band hall, and no library.

- BISD is great in my opinion. The teachers should have more control/discipline in the classroom. Our hands are tied right now. We have to watch what we say and how we say it. Children need to respect everyone. We should go back to the little slap in the hand if a rule is broken.
- Teachers need to have more input in curriculum and programs for classrooms. BISD has so many administrators with ideas without asking teacher input. Most of these area administrators have been out of the classroom for 10 or 20 years. They have no idea how the classroom has changed. Things are bought that are never used in the classroom. Too much waste is happening to look good on paperwork.
- Power struggles between school board and superintendent. Refusal to compromise and cooperate with best interest of teachers and students. Very inconsistent discipline on campuses. Student rights violations occur by placing general ed students in special ed setting for punishment. Profanity is used by students in classrooms and hallways without consequences by administration and teachers. Some principals are allowed to threaten, intimidate, and verbally belittle their staff.
- Recommend BISD offer more foreign language class options instead of Spanish and French. Recommend students be placed in non-Spanish speaking Spanish class environment when applicable to allow better class environment for the students not familiar with Spanish.
- Staff development meetings are mostly waste of time and money. First year in the Special Education department, teachers were sent to the same consultants presentation three times throughout the school year.
- Health insurance costly, with high deductibles.
- I think the "re-testing" policy simply promotes a "welfare" type of mentality, and students aren't held accountable for poor decision-making. One way the district could save a lot of money is by reducing the air-conditioned air that's wasted by open doors.
- Education is being tailored for TAKS. This might be to the advantage of low performing students, but to the disadvantage of students that have already reached that level. Students performing on the higher end of the scale should be advised to attend private high schools.

- Last year, the BISD made an enormous effort to increase the safety and well being of the students. The problem lies in the management style of the largest, most complex districts.
- The district purchased a science program that the teachers were all against. Our school doesn't have a lab to conduct these experiments required in the program. We need a new program that we can implement. We need board members that will allow the superintendent to do his job. Board members are not for the children.
- Although the morale is very low, teachers are able to get their jobs done. Students score well on basic skills. We need to aim higher and not spend so much time on the test. There are work sheets every day, and skills taught toward the test. It is always the test. We need to teach the whole curriculum.
- Teacher morale is at an all time low.
- As long as the superintendent and the board members are pulling on at opposite directions, we can't work to our full potential. Also, the insurance for teachers and staff is another joke. Teachers, parents, students should feel at ease without tension and pressure from administration.
- Elementary school students have to rush to get a tray, and can't get a choice in food. They eat whatever is given to them.
- Restrooms need to have soap and hand towels daily. They need to be clean at all times. Sometimes they smell awful.
- The morale has improved under the interim superintendent. I answered based on the suspended superintendent.
- Paperwork is astronomical. Offices don't share information. Teachers often have to submit the same information on different form to different offices.
- Education can get lost in paperwork, rules and regulations.
- Extra-curricular activities are suffering because it is difficult to sponsor them.
- The professional conduct of board members, area principals, and the superintendent is demoralizing to teachers, faculty and staff. We are tired of the "compadre" atmosphere in the BISD. Teachers are afraid to speak out because of retaliation. There is a general unfairness in BISD. BISD is not about the children, but the advancement of self. Teachers do perform well in spite of all this conflict.
- I fell, as do many teachers, that experienced teachers that have demonstrated they are effective in the classroom should be left alone to do their job. There should be a way for teachers to evaluate the principals' performance, since we deal with them on a daily basis. Principals should not break a good team of teachers for no good reason. When teachers apply at a school, they can choose

which school, which grade, and which subject to teach. After the initial year, we loose all that, can be moved anywhere.

- If a teacher assaults another, shouldn't he be removed immediately from campus for an investigation? Well, it's not done here. I was assaulted in December and am still waiting for my day in court. I keep getting the runaround from everyone at BISD.
- We need more computers in each classroom or at lest two computer labs that everyone has access to. All teachers should take a six-week course in computer literacy like the students do and also be able to take free keyboarding classes.

Appendix E
STUDENT SURVEY RESULTS

Demographic Data

Note: Percentages may not add to 100 percent due to rounding.

While these surveys were not scientifically administered, the results of a sampling of 618 students are included here to show their general opinion.

A. Educational Service Delivery and Performance Measurement

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
1. The needs of the college-bound student are being met.	10.0%	49.0%	22.8%	10.2%	2.1%	5.8%
2. The needs of the work-bound student are being met.	5.8%	46.6%	31.1%	8.3%	1.9%	6.3%
3. The district has effective educational programs for the following:	13.6%	58.1%	15.4%	7.1%	1.3%	4.5%
a) Reading	16.0%	61.5%	10.7%	5.8%	1.6%	4.4%
b) Writing	23.1%	55.2%	9.4%	6.0%	1.8%	4.5%
c) Mathematics	18.4%	57.8%	10.7%	6.8%	1.3%	5.0%
d) Science	21.5%	57.1%	10.5%	4.7%	1.5%	4.7%
e) English or Language Arts	19.9%	51.9%	14.6%	6.3%	2.4%	4.5%
f) Computer Instruction	18.8%	57.6%	12.1%	4.9%	2.1%	4.5%
g) Social Studies (history or geography)	24.3%	51.1%	12.6%	5.2%	2.3%	4.5%
h) Fine Arts	24.4%	50.6%	14.4%	4.4%	1.6%	4.4%

	i) Physical Education	16.5%	50.8%	19.6%	6.0%	2.1%	5.0%
	j) Business Education						
	k) Vocational (Career and Technology) Education	20.4%	46.4%	19.3%	7.0%	2.1%	4.5%
	l) Foreign Language	19.4%	48.5%	15.7%	6.6%	2.6%	7.1%
4.	The district has effective special programs for the following:						
	a) Library Service	16.0%	46.8%	21.0%	7.8%	3.7%	4.5%
	b) Honors/Gifted and Talented Education	20.6%	47.2%	18.4%	6.5%	2.8%	4.4%
	c) Special Education1	18.8%	44.2%	24.8%	5.5%	2.3%	4.4%
	d) Student mentoring program	11.0%	37.1%	28.5%	15.2%	3.7%	4.4%
	e) Advanced placement program	23.1%	47.9%	16.7%	4.9%	2.6%	4.7%
	f) Career counseling program	14.2%	41.1%	24.1%	11.0%	4.9%	4.5%
	g) College counseling program	14.6%	37.2%	24.3%	14.1%	5.7%	4.2%
5.	Students have access, when needed, to a school nurse.	24.9%	46.3%	11.7%	9.4%	3.6%	4.2%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
6.	Classrooms are seldom left unattended.	12.5%	29.8%	26.7%	19.6%	7.0%	4.4%
7.	The district provides a high quality education.	13.1%	46.3%	20.1%	11.7%	4.5%	4.4%
8.	The district has high quality teachers.	12.6%	42.9%	24.9%	9.4%	6.0%	4.2%

B. Facilities Use and Management

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
9. Schools are clean.	15.5%	40.5%	17.3%	12.6%	10.0%	4.0%
10. Buildings are properly maintained in a timely manner.	12.9%	47.2%	18.4%	12.0%	5.2%	4.2%
11. Repairs are made in a timely manner.	9.5%	35.4%	21.7%	18.1%	11.0%	4.2%
12. Emergency maintenance is handled timely.	12.6%	42.1%	24.4%	11.2%	5.5%	4.2%

C. Purchasing and Warehousing

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
13. There are enough textbooks in all my classes.	10.5%	37.4%	13.8%	23.3%	10.7%	4.4%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
14.	Students are issued textbooks in a timely manner.	10.0%	44.2%	19.6%	14.7%	7.1%	4.4%
15.	Textbooks are in good shape.	4.7%	23.3%	18.9%	27.5%	21.2%	4.4%
16.	The school library meets student needs for books and other resources.	16.2%	46.4%	16.8%	10.2%	6.0%	4.4%

D. Food Services

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
17.	The school breakfast program is available to all children.	36.6%	43.7%	7.0%	4.4%	4.4%	4.0%
18.	The cafeteria's food looks and tastes good.	4.5%	20.7%	22.0%	19.4%	29.3%	4.0%
19.	Food is served warm.	6.3%	39.5%	21.4%	16.5%	12.1%	4.2%
20.	Students have enough time to eat.	5.2%	19.7%	7.4%	18.9%	44.7%	4.0%
21.	Students eat lunch at the appropriate times of the day.	11.8%	47.2%	11.0%	11.5%	14.4%	4.0%
22.	Students wait in food lines	5.3%	14.9%	11.2%	19.1%	45.6%	3.9%

		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	no longer than 10 minutes.						
23.	Discipline and order are maintained in the school cafeteria.	7.3%	45.5%	21.2%	10.7%	10.5%	4.5%
24.	Cafeteria staff is helpful and friendly.	16.2%	44.0%	21.4%	8.3%	5.7%	4.5%
25.	Cafeteria facilities are sanitary and neat.	14.4%	45.5%	22.5%	7.0%	6.1%	4.5%

E. Transportation

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
26.	I regularly ride the bus.	11.0%	19.4%	22.8%	15.7%	26.2%	4.7%
27.	The bus driver maintains discipline on the bus.	9.1%	25.9%	49.0%	5.7%	5.3%	5.0%
28.	The length of my bus ride is reasonable.	7.1%	25.6%	48.9%	6.3%	7.4%	4.7%
29.	The drop-off zone at the school is safe.	12.3%	31.6%	44.7%	2.9%	3.4%	5.0%
30.	The bus stop near my house is safe.	11.5%	29.4%	46.6%	2.8%	4.9%	4.9%
31.	The bus stop is within walking	9.5%	29.1%	47.6%	4.2%	4.7%	4.9%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	distance from our home.						
32.	Buses arrive and leave on time.	4.7%	12.0%	48.2%	16.2%	14.2%	4.7%
33.	Buses arrive early enough for students to eat breakfast at school.	5.5%	16%	47.1%	12.9%	13.6%	4.9%
34.	Buses seldom break down.	5.3%	17.8%	56.1%	9.7%	6.1%	4.9%
35.	Buses are clean.	8.1%	27.0%	48.9%	5.7%	5.3%	4.7%
36.	Bus drivers allow students to sit down before taking off.	12.5%	25.9%	46.0%	5.7%	4.7%	5.2%

F. Safety and Security

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
37.	I feel safe and secure at school.	12.3%	51.1%	16.2%	10.2%	5.7%	4.4%
38.	School disturbances are infrequent.	7.4%	44.8%	25.4%	11.8%	6.1%	4.4%
38.	Gangs are not a problem in this district.	13.8%	35.8%	23.3%	13.3%	9.7%	4.2%
40.	Drugs are not a problem in this district.	7.1%	20.9%	25.2%	24.9%	18.0%	3.9%
41.	Vandalism is not a problem in this district.	5.2%	23.5%	24.3%	29.1%	13.8%	4.2%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
42.	Security personnel have a good working relationship with principals and teachers.	11.3%	46.8%	26.5%	6.5%	4.5%	4.4%
43.	Security personnel are respected and liked by the students they serve.	11.3%	41.9%	21.7%	11.3%	9.1%	4.7%
44.	A good working arrangement exists between the local law enforcement and the district.	7.4%	40.6%	38.2%	5.7%	3.7%	4.4%
45.	Students receive fair and equitable discipline for misconduct.	8.7%	39.3%	22.5%	15.9%	9.4%	4.2%
46.	Safety hazards do not exist on school grounds.	6.6%	27.2%	37.2%	15.4%	9.1%	4.5%

G. Computers and Technology

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
47.	Students have regular access to computer equipment and software in the classroom.	11.0%	38.8%	15.2%	21.2%	9.2%	4.2%

48.	Teachers know how to use computers in the classroom.	10.8%	50.3%	18.3%	11.2%	5.2%	4.2%
49.	Computers are new enough to be useful for student instruction.	12.1%	47.1%	16.5%	12.6%	7.4%	4.0%
50.	The district offers enough classes in computer fundamentals.	11.0%	43.9%	22.0%	12.0%	6.8%	4.4%
51.	The district meets student needs in advanced computer skills.	9.7%	41.7%	23.3%	13.3%	7.9%	4.0%
52.	Teachers and students have easy access to the Internet.	14.6%	44.2%	15.2%	12.3%	9.2%	4.4%

Additional Comments: Students

- I honesty feel that my privacy is being invaded with the mesh backpacks. Plus we have to carry almost all of our books due to the fact that our school does not let us use our lockers. My parents have had to buy me 4 backpacks already because the weight of the books causes them to tear. Here at Pace, we get 45 minutes to eat lunch. They take away 15 minutes in the morning to make us eat breakfast. Breakfast should be an option and they should add those 15 minutes to make it an hour lunch. The cafeteria gets extremely packed and 45 minutes isn't enough time.
- I don't think my high school is really enforcing and following the rules. Specially the dress code and skipping. The office people will get after some of them but not all of them. There are also regular backpacks in this school. About education performances; sometimes we do not have the necessary materials like markers, labs, books, etc. for teachers to educate us. Some guys also get together and stand on both side of the halls wall and look at the girls, and say improper things to them.
- To whom this may concern, I disagree over the fact that we have very little time to eat - 45 minutes. Most of us (the majority) take about 15 minutes to 20 minutes in line and then everyone cuts in line. Also having no lockers. I really hate that. My backpack is very heavy and due to that I had to go to the doctor and now I have to wear a brace under my t-shirt, which really irritates me.
- I believe that the educational performance of BISD is pretty good, the teachers and classes are great. The only complaint I have is that we need a slightly longer lunch period because some days you are waiting so long in line that by the time you finally get your food the bell rings for 4th block. I also think that we should move our lunch time earlier, like at 12:10 instead of 1:40, that time is too late for lunch and during 3rd block we are all really hungry and it's hard to concentrate on growling stomachs.
- There is not enough time to eat lunch, and we have a need for lockers. The athletic training room is way too small. Athletic equipment is large. We need the ability to acquire better rehabilitation equipment. We need more space.
- I believe that we should have school lockers. Many of the classes that we take provide books and we students have to carry them around. Also our lunch schedule short. By the time you receive your food you find yourself in a rush to eat.
- In my opinion we have some things that need to be changed. For example; I feel that we should be able to have lockers. I have about 3 or 4 books that I can't carry because my backpack is too heavy. Also our backpacks I think should not be mesh. One great

comment I do have is about our teachers. We have great teachers that really know what they are teaching

- I believe it is unnecessary that we as students must use mesh backpacks. We should not be punished as a whole team for the actions of a few people.
- I believe the rules for punishments given to students who engage in combat are unfair.
- We need longer lunch periods, the food is not great, it's to dry, sits to long, and it's cold. We wait in line for lunch too long. The cafeteria is too small.
- I strongly believe that our students need more time for lunch. At least 1 hour and 15 minutes.
- Better medical equipment, band instruments.
- Zero tolerance rule is not fair. I would like at least 1 hour for lunchtime. I would like access to the Internet at all times. No ISS for being tardy. For every so many tardies, they should equal to one absence. Please start a medical program so we won't have to go all the way to med-high.
- I am fairly new to this district, but when I first came everyone made me feel completely welcomed. I really enjoy coming to school here and do not intend to go anywhere.
- We need more money to build a baseball fence.
- We need more lunchtime to eat.
- We should have more time to eat, so we won't be tardy, have enough time to eat slow not in a hurry.
- We should have more time for lunch at least an hour. Take away breakfast if you have to, but give us more lunch time.
- I feel that the AP and pre-AP teachers are more helpful than other teachers. They care more about the students. I am not complaining because I take AP classes, it's just that other students don't have the same great teachers as I do.
- Everything is looking good.
- It's wonderful.
- They should spend more money on football.
- Things need to be fixed at the main office, with the higher officials, and you can fix things in the school. We also need a superintendent that will last 4 or 5 years. The people at the main office also need to stop spending our funds on themselves and other useless things, and give more funds to the school.
- I believe that the BISD can do more to prevent students taking drugs or weapons to our school. A lot of people in our school are drug addicts because of the easy access.
- Not enough challenging courses, not enough time to eat lunch. It takes 20 minutes to get your food, and you can't find a seat; then you are only left with 5 minutes to eat.
- School needs better counselors.

- I strongly feel that almost everything in our school district is perfect.
- The students would like to have more time during lunch due to the long lines and the space in the cafeteria.
- I think that you are doing a good job.
- The library has very outdated books and few classics.
- I personally believe that BISD district needs more money for better development of our schools. We need better books, our classroom don't have computers, and the ones that do have the computers are very old. I think that is discrimination to us; is because we are at the border? How comes schools in the northern states of the U.S. are better maintained and equipped? Plus our classes are just basic math, history, science etc. What we need is highly advanced classes to prepare us for the future. For example: computer technology, sociology, etc.
- We need a whole hour for lunch. 45 minutes is not enough. It takes about 30 minutes to get your lunch in school.
- The food is no good, the classrooms are hot, the teachers don't know what they are doing. I get discriminated against because of my race and background. I often don't get equal treatment like the other students. And they keep towing my car from the parking lot.
- I have no problems.
- Everything is ok.
- There isn't enough time to eat lunch in the cafeteria. Sometimes I don't eat and I get sick. The food is no good.
- We need new books.
- My comments are not the school itself; mainly the only thing is getting our schedules, which makes us behind in class. The counselors get mad whenever we go and see them.
- I have a problem with the computer at school with the Internet because we could only use them in the library. We should get more computers in the classrooms.
- Everything is fine, Pace is very cold and g-hall is the coldest. They do this to cover up the mold. The lunches are not good.
- I think it's fairly good.
- The only thing that has completely annoyed me about BISD is the fact that the health science technology @ UTB was cancelled, then it was moved to Hanna high school and I figured that was ok. Except that the bus barn never seemed to have a bus available for us. We finally got in route to get to Hanna on time, our 3rd period decides to complain about the teacher being mean and unfair; this of course caused the teacher to be moved, and instead of asking 4th period how we felt, they completely ignored us. I think again the program will be dropped because of a couple of brats.
- There is too much vandalism in the bathrooms. The glass doors are always breaking and cracking.

- I think we need mentoring for some students to help them with some classes. We also need teachers to have patience such as explaining the work that is assign to us.
- I think they should lighten up more of the halls. I also think that the dress code is not used properly. Some girls still wear short skirts and they only say something to some girls, not all of them.
- Some of the teachers and faculty staff are very disrespectful; when you approach them mannerly they give you attitude and looks that are very uncalled for.
- I think that the education performance at BISD is good.
- I think BISD is the dumbest school district in the valley.
- I am ok with just about everything for now. When I have a complaint, I'll let you know.
- It's not too great; it has its ups and downs.
- I think my school is safe and has a good education and I am thankful for BISD.
- Counselors need to be more available for students, not only for school purposes but for daily problems as well. Teachers should limit the amount of homework to 45 minutes maximum.
- Here at Hanna high we have many teachers with cancer, or that have died of cancer, and the only one to blame is the district because they haven't done anything about it. And that in the long run is going to hurt us student too. Something should be done about it.
- The tardy rules are too strict for the students.
- I think BISD is cheap and doesn't know how to budget their money.
- Please improve cafeteria food.
- You need to listen to the students.
- I won't be here next year, but I sure do hope that this next year they make some enhancement to our school. It is in serious need of renewal.
- We should have programs preparing us for SAT/ACT.
- Listen to student needs, update library, find more teachers who are about the children not the money, pay more attention to students needs, focus attention on students event not dress code.
- Here at Hanna high, students are not in an effective learning environment. There are too many students and not enough teachers, nor are there enough classrooms. Our school is dirty and the food taste like rubber. There are too many drugs and violence for a learning environment for the students.
- Hanna high school itself is too old. Very few things are new. We do not have enough supplies like desks, new books, and science supplies, etc. It is not fair that other schools in the BISD are in good condition and Hanna isn't. We need a new school-a new Hanna especially with the mold problem we have.

- The school needs a little work on a few aspects.
- This survey is dumb.
- Dress code is unfair. Teachers security, principle, staff very friendly.
- The school is great, I am glad to be here.
- Food is bad and cold, the school is falling apart, principal doesn't get involved with the students, plus I don't feel safe here. Students are not allowed to go to the bathroom.
- There are a lot of weird people at school.
- I think the people who work at Hanna should worry about kids using and carrying guns, drugs, instead of freaking out about the dress code being enforced.
- I believe they should concentrate on building quality classrooms when they build the new school.
- The only real problem at school is the buses arriving late to school and after school. Also we need to have more information on college, so we can be well prepared on it.
- We need a bigger library, and the food needs to have better variety.
- Everything is good, only that I think we need more lunch time.
- I think we are very lucky to have the education we have. And I thank BISD a lot, not many have the same luck.
- We need school supplies; such as books and calculator. They are needed for students.
- I think we need to have a drug test for students and teachers.
- Education-wise we are ok, but we need more time for lunch, at least an hour.
- I feel that we do not have enough time to sit down and eat our food.
- I strongly disagree with the cafeteria issue, we don't have time to eat our food, and we need at least an hour lunch.
- The education at Hanna is good.
- School is good, but we need our own campus.
- We need an open campus, and better quality food.
- We need better quality of food.
- Dress code should be taken out. Students should feel free to wear whatever they want, and they should feel comfortable.
- The BISD is ok.
- Some counselors are very lazy; I don't see how they can help us.
- You need to hire more teachers here at Hanna.
- In the afternoon, the bus gets to school real late, almost everyday.
- BISD has a decent school district. BISD has many talented kids and even though we have our problems once in awhile, we are a decent district. The quality of education is good, at least at KHS it is. They have many advanced programs that help kids prepare better for college.

- I feel that we should get more than 30 minutes for lunch, the lines get pretty long and there are times where we don't have enough time.
- Altogether I believe my school is a good place to be at. Teachers are pretty good. Overall it is pretty good.
- Educational performance is great in BISD. There are still some areas that need to be worked on like time arrival of buses to and from school, and time to eat lunch needs to be extended due to the amount of students in line waiting to be served.
- Students need to be challenged by having better classes. What I mean by better is they need to be more advanced classes.
- I feel that students taking college courses in high school should be better prepared for the college atmosphere. Although the curriculum is very good we don't really learn how college really is.
- My comment is that only about one out of 60 students pass the AP exams.
- On a scale of 1-10, I strongly believe that BISD rates as a 6. There are ways that BISD could make our time at school more educational. The district wastes too much time on such problems with the leaders they are not focusing on the children. The budget is not spent wisely; they should spend more money on other programs at school.
- We need more time to eat and more food on our plate. Sometimes the food finish real fast and we don't get to eat.
- BISD has very reasonable things to give its students. It also lacks money to buy equipment needed in some classes. Although there is a set back, BISD has managed our school well.
- Educational-wise BISD can meet the needs for the future, college graduates for the future. I believe that school for my future children will be filled with many opportunities for them to succeed, far more than what is offered now.
- The only thing that really bothers me is the little time we have to eat. For example, it takes me about 15 minutes to get my food and then by the time I sit down I don't have time to eat it.
- I believe that BISD has done a good job with our education.
- I think BISD is a good district. Sometimes they should pay more attention to the students at some levels; once in a while we may be right. Anyway the teachers are great.
- I think we have good teachers. We have teachers for all levels of classes. Teachers do a good job, but sometimes they exaggerate and they give us a lot of work. We students also have a life and we don't want to have a lot of homework, and have to spend all afternoon doing homework.
- The time that is allowed for lunch is not enough; we get 30 minutes, which is 15 less than last year. I strongly feel that isn't fair. You stay in line for at least 15 minutes then you have to eat

like a hungry dog in order to beat the bell. You need to give us more time to eat.

- I feel we don't have enough time in the cafeteria. By the time I get to the cafeteria it takes me 15 minutes to get my food and sometimes there isn't any food left, and if I get food, by the time I finish (if I finish) the bell already rang. I have to eat in a hurry. I also have a class in C wing and have to get to the wing within 5 minutes; I don't make it.
- The BISD teachers are exceptional and are successful in educating the students. If anything, I disagree with some approvals of foreign teachers. I believe they need to understand the US laws and have a BISD handbook before being able to teach. I have had a few or many complaints toward some foreign teachers that have not adapted or respected our way of life and culture.
- The educational performance of BISD meets the criteria of a well-balanced high educational standards district. The magnet of fine arts could use a supply of income (since the fine arts magnet is normally left out of the magnet schools) to help better understand the career ways in media, theater, dance, art, music, etc.
- Need to send teachers to more AP conferences, so they and the students can handle the AP test and so teachers can learn new and effective methods of teaching. Need to build on the freshman and sophomore level courses to be better prepared for junior and senior year.
- BISD does not do well at all.
- I think that at least every classroom should have two good working computers with a printer that works.
- We need more time for lunch.
- BISD is a corrupted school, and doesn't know how to make decisions.
- School is good.
- I think that the education is fair and good but what I dislike about school is that they only have 2 places where students could go to the restroom. They should have more restrooms over different parts of the school. We need more restrooms all over the school.
- The food is nasty. You keep changing our schedule, an hour for everything except for lunch; we should have an hour for that too. The restroom smells nasty. Nothing in this school works at all.
- It's a good district to study and be prepared for life, but the problem lies on the security personnel. Also, there is not enough time to eat, we need an hour lunch.
- Some students and I prefer the extra time added to classes. We need extra time added on to lunch time; we need about 1 hour and 15 minutes, time to eat off the school campus and giving us time to return on time.

- We need more time for lunch. 45 minutes is not a very long time to eat, even if we eat in the cafeteria at least 30 minutes extra to the lunchtime.
- All high schools should be made open campus, and the lunch period should be longer.
- Well, I think we need more computers in the classroom. Also need better text books; cleaner restrooms, we need open campus for lunch and longer lunches.
- We should have an open campus; we also need a body shop class in Rivera high school. Teachers should be armed with a paddle; drug abuse should be dealt with in a hard way. Bus drivers should be armed also.
- Educationally, the BISD challenges us to succeed in our classes and I am satisfied with that. What I don't like is that they don't give us the tools like other schools do, like better books, and better computers to better our performance. I also feel that they don't give us enough time to eat lunch, and they keep us on a closed campus.
- I am happy with the teachers because they are very good instructors. The thing that concerns me is the restrooms. They are a complete mess. Of the restrooms that are available to us, only 4 are working; the rest are out of service, another 4 don't have doors, plus there is no soap and that is not good for our health to go without washing our hands. We have to make a big line in order to use the restrooms and by the time you get there the bell rings. Either we go really late to class or we have to miss part of the lesson because we didn't have time to go to the restroom between classes. I will really appreciate it if something is really done about this situation. It is not only me who is concerned, but the rest of the girl students also are concerned.
- Conduct punishments are too severe.
- BISD is in good condition.
- It is good overall, compare to Mexico where I came from. The teachers are doing a great job and keep up the good work.
- I think it is not that good, because they should have more programs for the students.
- We need new computers, better books.
- We need more time for lunch.
- I think BISD is ok.
- Things at school are good and safe, but some issues could be addressed better for example; better food, longer lunch hours, better restrooms.
- I am like many other students, my dream is to graduate. I personally think this is one of the best schools in BISD.
- I think and feel that we are getting well educated in BISD.
- The only thing is that lunchtime should be longer, but do not extend our school hours.

- Everything is great.
- You need to work on the questions that are wrong and try to do better.
- I don't have anything to say.
- My only bad comment is the food tastes bad. Why do they serve chocolate and white milk? They should give us coke or punch at least.
- I believe that the teachers must be required to at least try and bond with students because a lot of teachers here do not care what happens to their students. I also believe that the school gym should be open at all times in order to encourage sports and make the students happy.
- The teachers should listen more to the students' opinion, rather than discouraging their ideas and coming up with their own. The principle should be more involved with the students rather than canceling every fun function there is at school.
- I think they should make the school an open campus, because sometimes there is not enough food to feed everyone. For example, some students are waiting and then they tell them there is no more food, even though there are students that buy food or snacks and not all us eat. You should do something about the situation.
- Some of our teachers have a very strong accent and it is hard to understand them, especially when it comes to a subject like math, when it is vital to understand the words the teacher is telling you.
- I have been to school in other states, and they have different ways of teaching. Here in the BISD, school is fun and educational, the teachers are friendly and know how to teach in a way that everyone will understand.
- The only thing that we students don't like about the school is the dress code.
- The BISD is good, but the only thing is that we don't have enough time to eat.
- Fire the superintendent and everyone on the school board. Hire decent math, science teachers for a change! Don't you do background checks on these people?
- I believe it is an all right district. A few topics that I would like to mention is the short time that they give us for lunch. I strongly believe the 50 minutes of lunch is not enough, lunch lines are sometimes too long to have a decent time to sit down and eat your lunch. We need an hour.
- I have no comments because I feel everything is working great.
- Our bathroom here at Rivera High needs to get new doors cause there is only 3 out of 5 restrooms that work or have doors.
- The education is good, but the maintenance is poor! Especially the restrooms (girls). There is no soap ever, and the doors are broken

off. Or, there are no doors at all. Please at least put soap in the restrooms! And doors! Please Rivera High please consider this.

- Well it would be nice to have better food. New doors and soap in the girls' restroom. A longer lunch period, open campus schools because of the fact that the food runs out in the cafeteria.
- The girl's bathroom doesn't have any doors. Also, there is no soap in the bathroom, or toilet paper or paper towels. Please consider this issue. Also, I think we should have an open campus; it takes a while to get food at our cafeteria, and besides, we have many restaurants and fast food places to take advantage as well.
- Well I think the lunchtime is not enough; it should be an hour long or so. Also, the dress code is getting too serious, we come to school to learn not to impress somebody, and I think we should be able to come however we want to as long as we feel comfortable.
- The food at school should taste better, and longer lunch period at least 1 hour.
- I think they should have more advance placement classes for those who want to go the extra mile.
- A lot of things have caused BISD to slack off in letting it come back to a great mess.
- I believe lunchtime should be given at least one hour.
- Some teachers are very nice, the education is good, the teachers explain in detail. I like this school compared to other schools in this same district.
- I don't like school.
- Overall, the education in Rivera is good, and basically everything is ok.
- I believe that Hanna High School doesn't let their students express themselves (dress code). Sometimes the school and staff are too naïve. Some teachers and the assistant principals think they have all the authority in the world. The counselors are not very knowledgeable.
- The tardy policies are just ridiculous; they focus more on restricting tardiness, when they should be focusing more on such subjects as theft, violation, violence and school safety. Students have a lot of homework and teachers don't care. They only want a student to focus on their class and forget about other work that is stressing a student. Well, at least that is the way I feel.
- The office or the people that confiscate the things of the students steal everything.
- Some classes only concentrate on tasks, rather than materials that are essential for a pre-college education. Also, they only concentrate on school attendance for cash flow rather than focusing on the real problems at school.
- We should get as many servings of food as we want, if we pay for it with taxes. I want to get my stomach full.

- I think there should be much more help for college enrollment and financial aid for those who can't qualify.
- Hanna High needs to get a better counseling department. The administrators don't know, but the counselors are not helpful. Most of them don't know what they're doing. I've gone several times for assistance, but my schedule is still missing some credits for graduation. The counseling department is doing very poorly.
- I feel that students at Hanna High do not receive proper attention and recognition. We need more time to eat our lunch. Also, the dress code should be that you wear what you feel more comfortable in.
- This school is no good.
- The problem is that they close the parking lot at 8:45; and if you can't get in before that, then you have to park your car outside, and your car might be towed away.
- Some teachers don't take their time to make sure that the student has learned what they taught. The restroom is a big problem; they need to let us go more often. Teachers should care a little more about the students.
- Our cafeteria food is terrible! I understand that sometimes it's not going to taste good, but it's sometimes not even cooked right.
- I liked it here at Hanna.
- We need better food in the cafeteria.
- This school is pretty good, but there are some improvements that need to be made, like better food in the cafeteria.
- The educational performance is really good; we need better books and more teachers in this school.
- Students have no future; sad but true.
- Please give us more lunchtime. Please help us!!!!!!
- Just think that this school needs to be rebuilt. And there should be more lunchtime given to us; students stand in line too long. Need more chairs and tables in the cafeteria. Bigger parking lot.
- Well this school is ok. But it needs better drainage and needs to be taken care of.
- This school needs to raise money so they can buy a new air conditioner, and it needs maintenance. The paint job is pretty bad.
- I believe that we don't have enough food for the students; the cafeteria runs out of food. I also think that school should be an open campus because of the fact that we run out of food. I also think it would be a lot better if we wore school uniforms.
- I believe that Rivera High should be an open campus because the lines are too long in the cafeteria; sometimes there is not enough food and not enough seats. Some students don't get to eat at all. Juniors and seniors should be the only ones with permission because we are more responsible. Thank you for taking your time

reading my comments and recommendations. I hope you do something about it.

- Lunch lines are very long, and it takes a long time to get your lunch. Vandalism is a big problem here at school.
- BISD is doing a good job keeping our school in shape, except that the books are very old, pages are missing out of them, students write all over the books. They need to get new books.
- Some teachers just teach, they don't go over the subject again. Sometimes I just don't understand and he would not go over it.
- My opinion would have to be, build a new high school. The school is in need of supplies. The school is not always clean, and the girls' bathrooms need soap and paper towels.
- Hanna High's portables are too old. We need more computers, need supplies such as new desks, the books are too old, and last we need lab supplies.
- Hanna is # 1.
- The education can be raised a little higher.
- We need a new school; this one is just too old.
- We need a new Hanna High, this building is too old.
- We need a new school. And we should have a better principal.
- Maybe it's time to build a new Hanna High School; I don't want cancer.
- Education is held very highly in BISD, but there are a few things that need to be addressed, like we need new computers, there are too many students and not enough computers.
- We don't have enough time to eat. Not everybody gets to eat because it's too full; we need more variety of food. We also need an open campus that would be the best idea for Rivers High. If what is stopping the district is the absences, people are still going to be absent or late on an open campus.
- There is a major problem and that is in all the restrooms there is no soap to wash your hands. There is no advanced computer classes like other schools like Porter. You need to fix the lockers, and assign them at the beginning of the year.
- The restrooms are dirty, no doors that actually can be closed, there is no toilet paper and no soap in the restrooms, the cafeteria food is nasty, sometimes the food is old, Jell-O and biscuits have mold growing on them, we don't have time to eat breakfast because the bus comes late, there is a lot of vandalism in the bathrooms, the education is not great at all.
- I think that our girls' restrooms need to be fixed because they don't have soap, the doors don't cover everything up, and some of them don't even have doors. We also need new lockers and more tables for our cafeteria. If possible we should have an open campus.
- The restrooms need doors that close, more toilet paper and we never have soap. Now our toilets are broken and at least one in

each restroom is broken. Another thing is that the ROTC and band are ignored by the school. We don't get water or access to the showers when we are sweating outside in practice. Another thing, after 10 minutes the cafeteria food runs out. We also need more tables.

- Everything in my campus is good. The only thing I hate is the restrooms, the doors are in very bad shape, they don't lock and you could see everything through the holes, most of the time there is no soap in the bathroom, the trash cans are too small. I hope you can do something about it please.
- I strongly feel money is of much more importance than me and my fellow peers. Like a previous teacher once said one day, someone will sue BISD for not teaching the students anything. The education that is offered to us is a repugnant offense.
- First of all, our girls' restrooms are horrible, we barely have 2 that work- most of them don't even have doors. Our walls are full of vandalism, we hardly have toilet paper and there is no soap in the restroom. Our cafeteria food is crappy. By the time I get a plate, there's no more seats left, and by the time I get seated the bell rings. We should really have an open campus. We also need lockers.
- Make new restrooms for girls! Also, we should have open campus for this school. Rivera High School.
- Our restrooms need a lot of improvements. There are no doors and no soap, then they wonder why students get sick. The air conditioning does not work properly; sometimes it is really hot and next time it is too cold.
- Most of all the restrooms are a problem, mainly because they need doors, toilet paper and soap. Also, we need trashcans. Also, what we need is new lockers. The restroom also needs to be a lot cleaner. We really do need repairs done in our school (Rivera High).
- Our school has been saying we would get lockers for the past 2 weeks. Many teachers are starting to give out their books and many students, including myself, are tired of having to take the books home and to school everyday.
- We should have open campus and the teachers should explain slower. Four years in high school is a little too much; we only need two years in high school. Teachers have a lot of discrimination.
- Even though I have been here for a short time I can see that teachers don't have communication with their students; some teachers are even rude and mean.
- Every year that passes, BISD rules are getting stricter. They apply a stronger dress code; students should dress whichever way they feel more comfortable. Instead of spending time judging our dress code and presentation, they should be improving the education.

Another thing is lunchtime. Forty-four minutes is not enough because we spend 10 to 15 minutes waiting in line to get a plate. The only good thing about the BISD is that we feel secure here.

- BISD should really get teachers who have good attitudes and not just degrees. The program should be fun, not enforced. Each day we hear the state wants more education and for what? The only thing they're doing is giving us more problems in school. The school I am in is great not perfect; just keep in mind that we're teenagers and we have liberties not just school. Just remember that.

Appendix F
PARENT SURVEY RESULTS

Demographic Data

Note: Totals may not add to 100 percent due to rounding.

While these surveys were not scientifically administered, in a random sampling of 2,000 parents that were sent surveys, 276 responded. The results are included here to show the general opinion of those responding.

A. District Organization and Management

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
1. The school board allows sufficient time for public input at meetings.	13.4%	45.3%	26.4%	11.6%	2.9%	0.4%
2. School board members listen to the opinions and desires of others.	12.3%	46.4%	21.4%	13.0%	6.5%	0.4%
3. The superintendent is a respected and effective instructional leader.	21.4%	38.8%	23.6%	10.9%	4.3%	0.7%
4. The superintendent is a respected and effective business manager.	20.3%	36.6%	28.3%	8.7%	5.4%	0.7%

B. Educational Service Delivery and Performance Measurement

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response

5.	The district provides a high quality of services.	23.6%	56.9%	4.7%	11.6%	1.8%	1.4%
6.	Teachers are given an opportunity to suggest programs and materials that they believe are most effective.	21.4%	46.0%	22.1%	8.7%	1.1%	0.7%
7.	The needs of the college-bound student are being met.	9.4%	47.8%	26.4%	11.6%	3.3%	1.1%
8.	The needs of the work-bound student are being met.	11.2%	42.8%	29.3%	10.9%	3.6%	1.8%
9.	The district has effective educational programs for the following:						
	a) Reading	30.4%	54.3%	4.0%	8.0%	2.2%	0.7%
	b) Writing	28.3%	55.4%	4.0%	8.3%	2.5%	1.4%
	c) Mathematics	28.6%	60.1%	3.3%	5.8%	1.4%	0.7%
	d) Science	26.4%	57.2%	6.5%	8.0%	1.1%	0.7%
	e) English or Language Arts	28.3%	57.2%	6.5%	6.5%	0.7%	0.7%
	h) Fine Arts	25.7%	55.4%	9.8%	6.5%	1.4%	1.1%
	i) Physical Education	28.6%	56.2%	6.5%	5.4%	1.4%	1.1%
	j) Business Education	18.5%	42.8%	26.8%	6.9%	2.2%	2.9%
	k) Vocational	18.8%	46.7%	24.3%	5.1%	1.4%	3.6%

	(Career and Technology) Education					
	1) Foreign Language	19.9%	47.5%	19.9%	7.6%	2.5%	2.2%
10.	The district has effective special programs for the following:					
	a) Library Service	29.7%	53.3%	8.7%	6.5%	0.4%	1.1%
	b) Honors/Gifted and Talented Education	29.0%	50.0%	12.3%	5.8%	0.7%	2.2%
	c) Special Education	31.5%	49.3%	11.6%	4.0%	2.2%	1.1%
	d) Head Start and Even Start programs	22.8%	46.4%	21.4%	4.0%	2.5%	2.9%
	e) Dyslexia program	23.9%	36.2%	28.3%	5.4%	1.8%	4.3%
	f) Student mentoring program	17.4%	39.9%	26.8%	7.6%	1.8%	6.5%
	g) Advanced placement program	23.6%	45.3%	19.9%	7.2%	2.2%	1.8%
	h) Literacy program	18.5%	47.5%	24.3%	5.1%	1.1%	3.6%
	i) Programs for students at risk of dropping out of school	19.6%	38.0%	25.0%	10.9%	4.0%	2.5%
	j) Summer school programs	32.2%	52.9%	7.2%	4.0%	2.2%	1.4%
	k) Alternative	19.9%	44.9%	23.2%	6.5%	2.2%	3.3%

	education programs						
	l) "English as a second language" program	30.4%	49.3%	12.7%	4.0%	1.8%	1.8%
	m) Career counseling program	21.4%	46.7%	18.8%	8.7%	1.8%	2.5%
	n) College counseling program	18.5%	39.9%	27.9%	9.1%	2.9%	1.8%
	o) Counseling the parents of students	22.5%	37.0%	17.0%	15.9%	5.1%	2.5%
	p) Drop out prevention program	18.8%	34.1%	26.1%	12.7%	5.4%	2.5%
11.	Parents are immediately notified if a child is absent from school.	30.4%	39.9%	8.3%	13.4%	6.2%	1.8%
12.	Teacher turnover is low.	11.2%	34.8%	34.4%	10.1%	5.4%	4.0%
13.	Highly qualified teachers fill job openings.	17.8%	35.1%	24.3%	11.6%	8.3%	2.9%
14.	A substitute teacher rarely teaches my child.	12.7%	37.0%	20.3%	19.9%	8.0%	1.8%
15.	Teachers are knowledgeable in the subject areas they teach.	22.5%	56.5%	11.2%	6.5%	1.4%	1.8%
16.	All schools	22.1%	41.7%	15.2%	11.2%	8.0%	1.8%

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	have equal access to educational materials such as computers, television monitors, science labs and art classes.						
17.	Students have access, when needed, to a school nurse.	34.8%	51.4%	4.3%	4.7%	3.6%	1.1%
18.	Classrooms are seldom left unattended.	21.7%	41.3%	24.3%	8.3%	2.2%	2.2%
19.	The district provides a high quality education.	27.2%	50.0%	8.0%	9.8%	3.3%	1.8%
20.	The district has a high quality of teachers.	24.6%	46.0%	13.4%	10.9%	4.0%	0.7%

C. Community Involvement

	Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
21.	The district regularly communicates with parents.	19.6%	44.2%	12.3%	16.7%	5.1%	1.8%
22.	District facilities are open for community use.	13.8%	41.7%	23.6%	13.4%	6.2%	1.4%
23.	Schools have plenty of volunteers to	14.1%	36.6%	22.1%	20.7%	5.1%	1.4%

Survey Questions						
help students and school programs.						

D. Facilities Use and Management

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
24. Parents, citizens, students, faculty, staff, and the board provide input into facility planning.	8.7%	33.0%	34.1%	17.4%	4.7%	2.2%
25. Schools are clean.	29.7%	53.3%	4.3%	9.1%	2.2%	1.4%
26. Buildings are properly maintained in a timely manner.	25.7%	52.9%	6.9%	9.1%	4.3%	1.1%
27. Repairs are made in a timely manner.	18.8%	47.1%	12.3%	15.2%	4.0%	2.5%
28. The district uses very few portable buildings.	9.1%	36.6%	22.5%	16.7%	12.7%	2.5%
29. Emergency maintenance is handled expeditiously.	19.9%	44.6%	21.0%	8.0%	4.7%	1.8%

E. Asset and Risk Management

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
30. My property	12.3%	32.2%	27.5%	14.5%	10.9%	2.5%

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
tax bill is reasonable for the educational services delivered.						
31. Board members and administrators do a good job explaining the use of tax dollars.	10.1%	22.5%	27.2%	22.5%	15.6%	2.2%

F. Financial Management

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
32. Site-based budgeting is used effectively to extend the involvement of principals and teachers.	8.3%	31.5%	44.9%	8.3%	4.7%	2.2%
33. Campus administrators are well trained in fiscal management techniques.	11.6%	32.2%	40.9%	8.3%	5.1%	1.8%
34. The district's financial reports are easy to understand and read.	7.2%	28.6%	42.0%	13.0%	6.5%	2.5%
35. Financial reports are made available	5.8%	22.1%	54.0%	10.9%	4.7%	2.5%

	to community members when asked.					

G. Purchasing and Warehousing

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
36. Students are issued textbooks in a timely manner.	26.1%	57.2%	5.1%	5.8%	3.6%	2.2%
37. Textbooks are in good shape.	21.4%	51.8%	7.6%	12.3%	4.7%	2.2%
38. The school library meets student needs for books and other resources.	22.8%	51.4%	8.3%	10.9%	4.0%	2.5%

H. Food Services

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
39. My child regularly purchases his/her meal from the cafeteria.	10.9%	25.7%	18.1%	29.7%	11.6%	4.0%
40. The school breakfast program is available to all children.	48.2%	45.7%	2.2%	2.2%	0.4%	1.4%
41. The cafeteria's food looks	18.8%	38.0%	14.5%	15.9%	11.2%	1.4%

		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
	and tastes good.						
42.	Food is served warm.	22.1%	47.5%	11.2%	12.3%	5.1%	1.8%
43.	Students have enough time to eat.	19.6%	47.1%	5.1%	15.6%	10.1%	2.2%
44.	Students eat lunch at the appropriate time of day.	20.7%	56.2%	3.3%	10.5%	6.9%	2.5%
45.	Students wait in food lines no longer than 10 minutes.	16.7%	42.4%	13.0%	16.3%	9.1%	2.5%
46.	Discipline and order are maintained in the school cafeteria.	18.8%	53.6%	9.1%	9.8%	5.4%	2.9%
47.	Cafeteria staff is helpful and friendly.	25.4%	46.4%	12.0%	9.8%	4.7%	1.8%
48.	Cafeteria facilities are sanitary and neat.	26.8%	55.8%	7.6%	4.3%	3.3%	1.8%

I. Transportation

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
49. My child regularly rides the bus.	29.0%	29.0%	17.8%	14.9%	6.5%	2.2%
50. The bus driver maintains	17.4%	33.7%	31.9%	6.2%	7.2%	3.6%

	discipline on the bus.						
51.	Length of the student's bus ride is reasonable.	14.1%	39.1%	30.4%	8.7%	4.3%	3.3%
52.	The drop-off zone at the school is safe.	25.7%	42.4%	21.4%	6.2%	1.8%	2.5%
53.	The bus stop near my house is safe.	20.7%	39.9%	24.3%	6.9%	4.7%	3.6%
54.	The bus stop is within walking distance from our home.	21.4%	44.2%	25.4%	3.6%	2.9%	2.5%
55.	Buses arrive and depart on time.	12.7%	37.0%	26.1%	9.4%	11.2%	3.6%
56.	Buses arrive early enough for students to eat breakfast at school.	13.8%	35.5%	30.4%	10.5%	5.8%	4.0%
57.	Buses seldom break down.	9.8%	35.9%	39.9%	8.7%	3.3%	2.5%
58.	Buses are clean.	14.9%	43.5%	31.2%	3.6%	2.5%	4.0%
59.	Bus drivers allow students to sit down before taking off.	21.7%	39.1%	29.7%	3.6%	2.2%	3.6%
60.	The district has a simple method to request buses for special	18.1%	40.2%	33.3%	2.5%	2.5%	2.5%

		events.						

J. Safety and Security

Survey Questions		Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
61.	Students feel safe and secure at school.	26.1%	48.2%	7.6%	10.9%	5.1%	2.2%
62.	School disturbances are infrequent.	13.8%	49.3%	16.3%	12.7%	5.1%	2.9%
63.	Gangs are not a problem in this district.	19.2%	33.7%	18.5%	17.8%	8.0%	2.9%
64.	Drugs are not a problem in this district.	18.1%	31.5%	17.4%	21.0%	10.1%	1.8%
65.	Vandalism is not a problem in this district.	15.6%	32.6%	17.8%	21.7%	9.1%	3.3%
66.	Security personnel have a good working relationship with principals and teachers.	23.6%	43.1%	24.3%	4.7%	2.5%	1.8%
67.	Security personnel are respected and liked by the students they serve.	20.3%	41.3%	19.6%	11.6%	4.7%	2.5%
68.	A good working arrangement exists between the local law	20.3%	48.6%	23.6%	3.6%	2.2%	1.8%

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
enforcement and the district.						
69. Students receive fair and equitable discipline for misconduct.	21.4%	43.8%	17.0%	10.5%	5.1%	2.2%
70. Safety hazards do not exist on school grounds.	13.0%	40.2%	20.7%	17.4%	6.2%	2.5%

K. Computers and Technology

Survey Questions	Strongly Agree	Agree	No Opinion	Disagree	Strongly Disagree	No Response
71. Teachers know how to teach computer science and other technology-related courses.	20.3%	50.4%	18.1%	5.8%	3.3%	2.2%
72. Computers are new enough to be useful to teach students.	17.8%	51.8%	15.6%	9.4%	2.9%	2.5%
73. The district meets student needs in computer fundamentals.	19.6%	54.7%	11.6%	8.3%	4.0%	1.8%
74. The district meets student needs in advanced computer skills.	19.2%	49.6%	14.1%	11.2%	4.0%	1.8%

75.	Students have easy access to the Internet.	13.8%	52.5%	18.8%	8.0%	5.1%	1.8%

Additional Comments: Parents (PART 1)

- No security at school.
- I just want to say that Palm Grove Elementary is a very good school with good educational teachers. All my five children went to Palm Grove; they are very intelligent because of the teachers and the facility themselves. They have high quality teachers and education.
- Our school board members do a poor job with our superintendent. I feel that because of their personal feelings they hold people accountable for their jobs. Speaking about one board member in particular. I have been disappointed at how our board members have conducted themselves at board meetings.
- We are very satisfied with the quality of education our children have received. The resources and the open communication with the children and parents is outstanding.
- We feel the teachers and administration should be praised and rewarded for their excellent services. Recognition is always important!
- My comments will be, if you could make a booklet or pamphlet (monthly or 6 months) on how our money is being spent for schools. Schools have different meetings every so often but we can't go because the meetings are about 11 a.m. We work at that time.
- This is our third year in BISD and I've been very pleased with the Cromack Elementary staff as a whole. We are looking forward to another year there. Being a single parent it is hard to participate in school activities. Especially now that I acquired a full time job. Go Lions!!! 2003.
- I feel that there is too much of a turnover with superintendents. It's a joke! At whose expense? Us - the taxpayers. There is a lot of nepotism going on so it seems that only their pocketbooks seem to be well feed. Us on the other hand, we wait for leftovers if any. The administrators are selfish and only care what's good for them, and if it works for them, that's all they care. I strongly feel that someone needs to step in and get rid of all the corruption in our district. We are in desperate need of good, honest and committed administration! Yes, you are correct. Every possible education dollar should go into the classroom for the students, teachers and employees of this district. After all, we are here for the children. Let's not let the administrators off the hook this easy. They are here to do a job - not try to see how many touchdowns they can score. Don't let this bickering go on any longer. Get the best men for the job, and get on with business.
- I am sorry I didn't answer questions very well. Because my son's school was closed due to a mold problem, the kids were put in a

portable school. I have not been around teachers very much because of my work hours. We are going on the second year of a portable school. I don't know if they have computers or not. I hope they fix the mold problem quick. I hear on the news the superintendent was having problems with the administrators.

- I think you have done a good job for my child. What I marked on the survey is enough of an explanation and what I think.

- When I was in public school over 20 years ago, we only needed 18 credit hours to graduate. The highest math I had to take was trigonometry. Today my children are taking Pre-calculus in high school and need over 20 hours to graduate. I think our school system is doing as good a job as possible with the facilities, equipment, personnel and technology available. Our problem, in my opinion, is our population of students from Mexico that have no desire to be educated, but only to be "supported" by our tax dollars and create problems in our community. I also have a problem with the high salaries being paid to all the "dead wood" in the main office. Some of this money could be re-routed towards the continued excellent education the students of our school district are receiving today.

- The only comment I have to share is that the school district keeps an eye out for the problems with mold; to have that checked more often than before so that our children do not come home sick with this problem. Thank you.

- Our district is in extreme turmoil due to the fact that some of our board members want to run the day-to-day operation of the district, which is a function that the superintendent is responsible for. Our board members deal directly with vendors, contractors, etc., which is clearly a violation, and a conflict of interest. They have shelved top-level administrators (superintendent, and assistant superintendent for administrative services) who were attempting to operate the district under the guidelines specified by law in order to enable them to continue maintaining their disgraceful and unethical practices. It is difficult for us as taxpayers and individuals who try to instill values and morals to our children when this is made public and obviously allowed since it continue to happen. It is also difficult to understand why agencies such as TEA, the DA's office, etc. who are aware that problems exist, do nothing about the complaints that have been filed. Why have inquiries or investigations not been conducted to resolve this serious matter?

- Thank you for looking into these long standing problems that have been deteriorating our district and community for too many years now.

- We continue to have faith that someone will care enough to actually do a legitimate investigation into the wrong doings of some of our board members.
- My child at Faulk has had his backpack stolen. My daughter at Del Castillo was being bullied on the bus on the way to school. My other son eats lunch at 1:50 p.m. and by this time food has run out during "A" lunch. How can food run out if the campus knows the enrollment count?
- Why are all the restrooms in elementary so filthy dirty?
- I feel that teachers are too populated with students and can't give the adequate education. I feel that they need more pay and administration needs a pay cut. Let's put our money to good use and pay our teachers. Enforce more strict laws against gangs and make our school a safe place to learn. I know if there are gangs and our crowded classrooms kids can't learn. Please help us.
- Education performance in Brownsville ISD is good, but the transportation system needs some type of discipline. Students are not treated the same when it comes to disputed problems. It takes a lot of time to resolve a problem in the system.
- I have four daughters. First has already graduated and gone to college. Second is going to high school. Third is in third grade. Fourth is in kindergarten. All my children's' years in school have been successful by being able to communicate with teachers on a one by one basis about my child and as a parent helping my children at home with whatever is necessary. Teachers, students, parents working together is a big success.
- Regarding question #7D, the school district knew of a mold problem that two schools had since 1999, and many students reported problems yet nothing was done until 01/02. Hanna High school had a problem with old chemicals and they were not disposed of until an accidental spill. I believe teachers should be allowed to give their opinions on teaching methods. This BORDER=1 town has unique challenges with many non-English students.
- This school district has improved its curriculum for Special Education. It still needs much more to be at the state level or national level. This school year (2002-03) has not begun and it is taking steps backward that took three years to implement. Please, please help us to bring some fairness and decent education for our Special Ed. Students. Everyone is so concerned with mainstream that they neglect our special children.
- Well, this is the first year that my daughter is attending school, but I heard that it is a very good school, and that the staff really understands.
- Well, I see that all BISD schools are clean and neat and the teachers know what they are teaching to our kids,

- I say that BISD schools are clean and neat, and that teachers are good teachers; when there is a problem with our kids they inform parents.
- Our school board is a joke. They continue to promote members of their families into top-level positions and hire people with no degrees to earn an excess of $50K. It is a slap in the face to teachers with 20 years experience earning less than a secretary without any college degree. Our school board also continues to buy out superintendent's contracts time after time! We (the taxpayers) are currently still paying off three previous superintendents and are in the process of having to payoff a fourth (the current superintendent) thanks to our school board trustees. They know nothing about fiscal responsibility.
- 1. Overall performance for school ISD would be poor (2-3) on a scale of 1-5. 2. There are approximately 30 computers for a school of 600 students - terrible ratio for computer lab. 3. My son's teacher delivered her second child and for half the school year (one semester) a substitute conducted the class! 4. English and spelling extremely poor in upper levels 9-12th grades - teaching freshmen college students - I've witnessed this deficiency! 5. Personally, I don't trust administrators to make decisions in the best interest for all students.
- BISD school board does not have the students or teachers best interest in mind. The superintendent has done a lousy job while the school board stands by and does nothing about it. Students in the technical programs do not have enough books to go around. Teachers have very little resources to work with. They are drowned in meaningless paperwork and do little teaching. Money is spent without concern or accountability. Teachers do not get paid enough for the work they have to endure.
- My children attend two schools, Binaries and Martin elementary. Bathrooms at Binaries were clean, but at Martin they were pretty gross! At both schools, I did not like the "counting" cards students must transfer from one place to another while getting their lunch tray. This practice delivers all kinds of germs, viruses, and parasites to my children's hands right before they eat. Also, it took forever for my child to receive Special Education Services and an ARD was never given at the end of the year!
- They are really getting better overall! Our scores are higher in our cluster! Children are seeing and experiencing better classes, teachers, resources.... We need to work on our school board mess! This hiring and firing of superintendents is ridiculous!
- Educational performance is wonderful, but providing safety measures for students in areas where there is no supervision. For example, lousy restrooms - my son had a restroom trashcan thrown over his bathroom stool, the trash can hit him on his neck, he did

not see who it was, was too afraid to report it until the following day. I went, spoke to counselors. Principal wasn't available. Was only told security wasn't allowed to go into restrooms to make rounds.

- I feel that the problems at schools, especially at Lopez High School are about not treating everyone equal. There was a situation in which several children were treated like drug addicts and they weren't. Security even checked personal belongings and read personal letters. I don't think it's fair because security checked only a small group of kids not other schoolmates. Another problem is that we don't have enough certified teachers to teach college credit classes, such as dual enrollment and G/T and AP classes. There is a lot of favoritism for football and the fine arts department is left aside. We are supposed to be a fine arts school, but not enough funds to work in that department. Practically everything goes for the football stuff. The ROTC programs also need funds for events. Thank you.

- I think that the BISD is doing a good job. But guys you need to talk with the teachers, because some teachers are very good, but some aren't. Some teach just for the money. The teachers should be there for us when we need help, not to be talking bad to us, or just to be warming the chair. Thank you.

- Teachers should put more attention to students when English is a second language. Because I have a child that English was her second language, and because teachers didn't put the necessary attention to her, she now has problems when she speaks.

- I as a parent feel that the food service at BISD should consider making good food. Real food that is. Kids should eat good healthy foods in school. That is why we the people pay taxes. As you can see I am not happy with the meals they serve my kids at school.

- I honestly do not agree how the teachers start pressuring the children about the TAAS from the beginning of the school year. I can understand how important this test is, but first we have to realize the pressure these children are under as it is. The teachers stop teaching about what is really necessary for the children to learn so they can get them prepared for TAAS. I strongly disagree of this test. I also disagree of schools that hire teachers from the children's own neighborhood.

- The overall performance of BISD has been positive and growing in academic growth. What has been disturbing in the superintendent feud with trustees, which has become a circus atmosphere? More should be done for the students of BISD and less about public disputes among board members and the superintendent.

- I'm happy with the school district here in Brownsville, Texas. What I don't like is the buses from BISD. They take too long after students are dismissed from school to get my children home. Once

they got home at 5:00 p.m. when they were dismissed at 3:15 p.m. and several times they came home at 4:00 p.m. or 4:30 p.m. I think that's a very long time, since it takes me only 15 minutes to drive from home to school. They get off the bus all sweaty, hungry and sometimes scared. Another thing I don't agree with is that they have lunch at 10:45 a.m. It's a very long period from 10:45 a.m. till 4:00 p.m. when they arrive home. Thank you for your time in sending this parent survey. I think this is a very good idea, and it was my pleasure filling it out.

- My 18 year old just graduated this year. He was a good student, good grades, but because he didn't do well in his SAT, TAAS, etc. tests, he will need to take developmental courses in college. How sad, because he won't get credit. I believe students need to be better prepared and need more help in taking their college entrance exams. He passed the exams, but scored low. My 8th grader is in the dyslexia program and doing very well.

- I am a single parent of now four kids do honestly feel that my kids' school Yturria Elementary School in BISD district has inadequate playgrounds where children often find snakes. They have no shade whatsoever; they have no swings for small children to play. They have no gym. They sit on hot black top since they have nowhere appropriate for sitting. The fountain has (barely) one faucet working. Children are not allowed to go inside the buildings for water or toilet purposes. Holes are often found in the playground area. Kids are made to sit on the black top despite hot weather. According to my children's doctor this could cause injury to our children. Please see that you take the time to come visit our school and see for yourself. We are taxpayers, and wish to see our taxes being used at our school. I honestly believe that our school has the sorriest playground ever. And wish to see all the appropriate setting for our children. Stop building schools - take care of the ones you've already got!

- I think for the benefit of the children riding the bus that BISD should select carefully the bus drivers. We the parents leave them in the morning at the bus stop and we hope the driver takes them to school without having a hard time, and for them to leave their problems at home and not take them to the bus, and take out their problems on the children. Thank you.

- I am very pleased with our district in how they handle themselves with our students. My only concern is how the people at the top manage the money. My main concern as a BISD employee is who and on what merits do they choose our insurance policies because we never seem to get a good policy protection. Another concern is why does it seem like they are always receiving raises and we as professionals at the campuses seems like we never see any of that money.

- The school board is constantly in turmoil, political agendas supercede the concern and interest of our students. There have been reported instances when school board members have used district funds to take family members on "junkets." The school board suspended our superintendent because he would not agree to be micro-managed.
- I don't agree with everything BISD board members do. I have had a lot of problems with the school district and every time I request a meeting with the superintendent, he is never available. Honestly the BISD lies too much.
- I want to know if BISD has a dress code that girls can't wear dresses and shorts that are real short. How come the cheerleaders wear their uniforms real short and they use them during school hours. I don't think that is fair.
- Board members do not allow the superintendent to do his job; they don't listen to teacher needs. Board members are not for what is best for students or teachers. They haven't been able to keep a superintendent. We seem to be always without a superintendent and having to pay off their contracts. They are self-centered and care about their own political benefits. They do not put children first. They give the district a bad image.
- The only thing that I do not agree with is that the students are not given textbooks to study at home. I believe that students need to be able to study from a textbook at home. However, maybe textbooks are out-of date and that would be the cause of not issuing books to students.
- I would like to have the opportunity to go into the cafeteria when my children are having breakfast. I feel that this is a very important time to share with them before they go to their classrooms. This will also open doors for parental involvement. At the school where my children attend, parents are not allowed to even step into the cafeteria without being run-off and that discourages parents from participating in school activities. This situation leaves me with a bad feeling and makes me wonder if my children are treated and eating well. I would like to see some changes.
- First and always I believe the BISD Board should consist of citizens whose children attend public schools, not private as many other school districts have chosen to adopt. The best interest of the children and decisions about their educational future should be made by members who, as parents are all aiming towards achieving the same goal. I feel there are many people in the district in "high" places because of politics rather than qualification - typical Brownsville "politics" - consequently, performance is already affected and our children are suffering because of it.
- I think they take too long to decide when to give special classes to kids that need them. For example my child failed first grade

because of truancy. Second of all, I think that it's not right for the children to be in portables. I don't know if you all have heard that our school Aiken Elementary had to be closed due to mold. That's why they got moved. They even have to eat in a portable building.

- It's OK, but my child does not like the cafeteria food and they don't have enough time to eat, either. I would like for you to consider having an open campus in all high schools. Thank you for considering my opinion.
- I would like the school district to come to a resolution to the problems and competition between the new (3) board members and the superintendent. It seems that the personal problems they have has gotten out of control and are involving the district and doing things that should have been left out of it. They are just looking for excuses to destroy each other, but are ruining our children's school system along the way.
- Well, I believe there is a good team in our school district, yet some teachers need to be patient and help students. I mean their own students - not just send them to another teacher they might not know. Especially for subjects like math, science, and well I guess only those two that most people need help in. Also lunch is good, yet some students need more time because they might need to do work during lunch and with 45 minutes it doesn't help them finish and go to lunch.
- I strongly disagree with the frozen food they serve at the cafeteria. My child does not eat at times, because food is either cold or has no taste at all. Cafeteria staff is unfriendly due to the fact that they keep telling 1st graders and all children "to be quiet or they can not buy chips, cokes, candies, etc." They are small kids and should be allowed to socialize since we do have a Hispanic background and are taught to socialize at the dinner table. I also strongly disagree with a 30-minute lunchtime - they should at least have an hour. I bet the rest of the staff takes an hour (not including teachers). And, I strongly disagree about the security in the schools. I have only seen one security guard at my child's school. This school also has people that are not even certified to direct traffic in their own parking lot, for example the principal (assistant). Parents picking up children have to park outside of the lot because teachers park there, when they can park in the back. So all the parents have to cross with their children to a street that is not even secured by security guards.
- BISD spends a lot of money sending administrators on trips to training taking place out-of-town. Administrators don't even show up for these trainings. They take in the sights instead. Teachers are constantly complaining about lack of materials. I know teachers that have to go to other schools to use a laminating machine or scanner, because their own school doesn't have these machines or

they are broken. Principals need to be trained in how to spend the schools money. There was one female principle who lost $50,000 one year, and $75,000 on another. All administration did was move her to another school. How did this move solve the problem?

- I think that in the middle schools the progress reports should come with the grade not with a P for passing, F for failing, or DF for danger of failing. Because the progress reports didn't have the grades, my daughter didn't make the top 5 percent. Just because of three grades. It wasn't letting my daughter know what she needed to work on in order for her to get top 5 percent, and recognized. Some students were left out, one of them was my daughter. Only 20 students were chosen.
- District should pay more attention to the needs of the teachers. They do so much for our children's lives. They deserve more for the effort they put in our Brownsville's schools.
- BISD is the only district in the state of Texas that allows 3 year olds in preschool, and 4 year olds in kindergarten. This is happening in Egly Elementary in BISD. This principal is breaking state laws. 1) I strongly feel that the children are taught around the subjects to excel in TAAS which I have noticed year after year how areas such as science and history are neglected. I understand the need to set goals and achieve these, yet sometimes children get penalized in other areas regardless of their effort due to neglect from teachers/ administrators. An example would be when one of my children had science on a Monday, did not get any text book to review or read at home or any handouts the next time scheduled for science class - they get tested. My understanding from that incident is that him and his classmates' grades suffered tremendously. 2) There are few other concerns such as not giving children the proper space to keep school supplies and books while at school. And on top of that making them responsible for anything that may happen to BISD property while in the student's hands. 3) Another issue is how children are not given any leeway to talk on their own, maybe play at their own pace if they choose to do so. Children are extremely active and if they do not let the energy out on 15 minutes of chatting with their peers, it seems that the moment they turn around to talk with another student, they get penalized (i.e. name on the board, note to the parent, detention) maybe it is something to look at. I understand that there is a time for everything and the proper place, yet I see that even when going out for lunch, students are treated like soldiers. Therefore not being in straight line, talking to other students are considered disruptive, and if this conduct persists, it is then considered rebellious by teachers. If kids get these messages, it could very well encourage the behavior to escalate.

- I don't have any comments at this time; last year was first grade for one of my daughters, so I don't know this district enough.
- I am very satisfied with the BISD, these two years I've been here from Houston. The teacher is better than Houston school district, and pay more attention to the student.
- Some teachers don't know what they are doing. We have requested G-T teachers for our kids in elementary school.
- I feel the teachers are not qualified to teach our children. They are there for the benefits of working as a teacher (vacation, bonuses, and pay).
- I feel proud to comment on the excellent performance of BISD and its staff. There should, however, be some improvement on the dress code in schools. There aren't enough words to comment on what many students wear to school.
- Teachers need to be paid more for the job they do. Also, they should have better insurance coverage. These two reasons are a good incentive for better teaching performance. If teachers are well taken care of, then their job performance is improved and the students will benefit a lot.
- We can't fight the system.
- I would like to know why children are zoned to a school that is quite far to where I live. You should look into that, because the school is on the other side of town.
- We have a shortage of (40,000) teachers in Texas and that affects Brownsville. We should pay teachers well to attract other qualified people to join the profession.
- I think BISD is one of the best school districts in Texas, that's the reason I enrolled my daughter in it. I believe in the power of education, and I also am a product of the BISD. I am proud to say as a student, growing up; I loved all the schools I went to. I would not have it any other way. I had a choice where to enroll my daughter, and I chose BISD, because I believe that their way of doing things is really effective. I hope this will help you.
- No, thank you for taking an interest in our thoughts and the well being of our Brownsville kids!
- When a student needs to be tested for dyslexia, the BISD takes months to test the student. By the time they test the student, it's too late, and the student ends up staying in the same grade.
- Good job!
- I don't think our tax dollars should be spent on students that don't have legal papers to go to school. They should be taught, but made to pay for the education. A lot of these students walk to Matamoras every day. They live there, and don't pay tax here in the USA. Thank you.

Additional Comments: Parents (PART 2)

- I believe that the school should extend the morning hours. The students wake up too early to go to school. They should go in a little later than usual. Thanks.
- My kids are at Aiken and Besteiro Middle School. BISD has handled the mold situation well, but it shouldn't have been allowed to get this far.
- I think we need another elementary school in our neighborhood. The Vermillion Elementary has too many children and it's impossible for the staff to do a good job with all the students.
- I think all programs for parents should be after 6:00 p.m., because we work and we want to go and see our children participate. Mother's day, Christmas, Fathers day, etc.
- Some teachers give students the answers, or tell them where to find it, which makes them lazy to look for anything. They want everything done for them. The teachers give them the page, and the paragraph. I understand they have a time frame, but they shouldn't do it all the time, because not all the students are the same. In the end they hurt the student. The teachers need to give the same attention to the English kids as well as the bilingual kids.
- I am very happy with the education they are giving my son in Vermillion Elementary. He is a Special Education student, and he is learning a lot in that school with his teacher. I am very happy with her.
- I personally feel that there aren't enough personnel to guide our children. Most kids come on the A honor roll from grades 1-7. High school years they drop to an A/B honor roll. By the time they reach college, they are a total disaster. The overall system is above average. We need to challenge our kids to do better by developing harder classes. Our teachers should earn as much as a medical doctor. Make teaching careers challenging so that only intelligent people can be teachers. We are only dealing with the future of this country.
- Start paying teachers well to keep them in the profession! This means better education for our children.
- I wish that my son could have a bus assigned, because he is disabled. He had a surgery on his right leg, and he gets tired walking home.
- Last year my daughter's teacher missed a lot of days from teaching; this makes it harder on the students.
- My 8th grade son's principal is very sports oriented, which is good, but he acts as if sports was the only thing that matters. No credit for UIL, band, science fair, choir, etc.

- I wish the teachers were less strict. Sometimes my daughter complains that the teacher spoke with her very rudely, and I would like that to stop, because it is really bothering me.
- Great school district. The BISD does continue to provide the best job with what they have.
- Overall high quality district!
- BISD's educational program is doing fine. I feel paraprofessional and office staff are underpaid and should get raises. These people basically run the school.
- I am sure that if BISD/State would not be so concerned with TAAS, our children would be better educated. So much time is put into test, test, test. I feel as a parent, somewhere along the line, the meaning of teaching is lost.
- BISD should have programs to help children learn to read and write English, especially in pre-K, and Kindergarten students. They should have more security at schools, because there are so many children disappearing, especially small kids.
- I suggest that BISD evaluate the performance of teacher aides and paraprofessionals. These people are very hard working individuals that are overworked and underpaid. These people are being asked to attend college, which I strongly agree with, but they are not being helped with tuition. And are not being promised a pay increase after they meet their college hours. You hear about these administrators getting high pay raises, but what about the people doing the work in helping the teachers of our children. I feel very strongly that these people should be compensated for their hard work.
- I think public school is a great place for my child to attend and not a private school. One thing I disagree with is the food because my daughter always complains the food made her tummy hurt and gave her diarrhea. That's the only thing - especially cheese. Thank you.
- I strongly think that we need more security for the school, especially since the railroad tracks are so close to the school.
- The educational performance of BISD is what the administration (including teachers and superintendent) makes of it. If a student is to perform to the best of his/her knowledge not only does the parent have that responsibility, but also being at school most of their time, educators make or break a student. In a clearer note, educators are the soul of the student. That is why everyone has their part in this world. Educators for students, and son/daughter for parents.
- Too focused on TAAS. Too much emphasis on football.
- PTA meetings (elem.) are hard to attend. Used to be Spanish only (that's been OK now). But kids are out of control - parents fault! Can't hear or understand what's being said. Better communication

between whose in charge and parents. Bus times for pickup in morning were really bad this year - varied 45 minutes (Southmost Elementary). More classes in English earlier in grades! Parents again!! Thank you.

- Most questions don't apply to my kindergarten child. The one thing I see is that my child's school does not have several things that other schools have. Her school is very poor. Money is spent on personnel and other things. Schools with money can afford to give incentives for different things. Teachers spend a lot of their money on those things. School funding should be equal. No school is better than another.
- I believe that all schools in Brownsville should be allowed to have the same type of events and technologies that schools that are in upper-class parts of the city. Every child, no matter if out of the city limits or inside city limits, country club vs. southmost, should have the rights and opportunities to advance and excel in school. Brownsville seems to put more priority and emphasis on schools that are zoned in good neighborhoods compared to those not so good. Class size does matter. Just take a look into San Benito's school district. All schools do good despite out of city limits or in the city. Again, class size does matter. And teachers play a very important role in inspiring our children. Rather than feeling overwhelmed by the class size and being frustrated and eager to run to the door exactly at 3:15 p.m., not even allowing parents to ask or make any comments concerning the child or homework.
- It's my opinion that there should be more effective communication between your district and your schools when dealing with special programs such as speech therapy.
- Not everyone in the district is bi-lingual. They make you feel as if it's your fault. Need better special education program and computer software to education children for the future. Teachers need to learn the differences of each child and not treat them like animals. Staff need to speak English! Some people graduated without speaking English!
- You do not ask about the drop-off or pick-up area for students. The area at Sharp is the most inappropriate area I have seen for any school. The area in front of the school is right on the side of the most transit streets (Palm Boulevard). I have 2 suggestions: 1) speed bumps right in front of Sharp just like the ones on Old Alice Road in front of Martin School, and 2) BISD Patrol at least every other day for 2 weeks giving warnings to parents that park in the drop-off and pick-up area. Also, children should not have lunch before 11:00 a.m.
- I feel the performance of BISD is about average. There are only two concerns in my mind. One problem is the amount of gang violence in the middle school and the other is the quality of food

prepared in the cafeterias. I realize you are trying to prepare nutritious food, but I see that most kids throw their plates away at least half full. My children don't complain about the salads or the fruit, but they always say the main course is either half-cooked or just tastes horrible. There is no point to giving free meals in the cafeteria if the children won't eat them.

- Too much politics and not enough education. Board members should have the mental attitude of what can I do for the district, instead of what can I get out of the school district. People should be employed for "what they know not who they know."
- I would like to suggest something, I think there should be more security in the restrooms in case of fights or inappropriate things that the teachers don't know about and to take account what the children say. There are teachers that don't take in account what the children say, that discourages them when they go to school. I think it is important that they have security around the school, like there was during summer classes; the same should be all year.
- I think that the school district is working for better education.
- It is good for me for my children, because they give quality education.
- I think there's a need for more school buses so the students don't spend too much time there. I think they should improve the mathematics classes since the outcome is poor.
- Is good and impartial.
- More help and understanding for our children in the computer area, s well as, to give schools more computer unities.
- My comment is that in some questions it helps the students and in some it doesn't and I hope for more opportunities for the students for next year, and also to encourage students to go to school.
- There are many things where the parents are not involved with their children, but not because they don't want to but because of lack of time. That's why there are many answers without opinions due to the lack of involvement of parents. But I think that the Brownsville school district is good.
- To me, education is good, therefore my comment is to continue working the same way so we learn more in reference to everything that is happening in the Brownsville school district.
- The functioning of education in Brownsville, Texas, I think is great, but of course is not perfect, the school, the building, the school supplies to the students are good but the teachers have to be motivated to give more love to the students and to the work they do not because they get paid.
- I think there is security in the elementary schools but not enough in the secondary level schools, there is a lot of drugs and gangs. I have seen how they fight in Perkins and Rivera. Also, the children have to walk far to the bus stations and sometimes there are loose

dogs, it's raining or they cross busy traffic streets. The buses first leave the ones that live far away then the ones that live close by; I think that's a waste of time.

- They say that restrooms have wall writings all the time where students insult each other. This provokes the students to be mad at each other and also to have fights. They also insult the teachers.

- My comments or complaint in regards to safety. Some teachers don't care when there's a problem, (for example) my child tells the teacher about a child that is doing something wrong, the teacher responds: "sit down or don't be gossiping." Maybe if there was interest in each problem a child has or analysis the problem could identify the cause of the disturbance in the child, so that way his mental attitude could change. True the good values are thought at home, but when I see something negative in the school, I stop and say, "what you are doing is incorrect."

- I am satisfied with my children's education and that there is good outcome, thanks to the support that is being given to them.

- I only have a child 5 years old, he is going to start kindergarten, and I don't have too much knowledge about the education. Thank you.

- The school has to see that teachers are giving the necessary education to the student, there are teachers that don't teach the child the necessary things, and they don't want to hassle with them. The food they serve is not that good sometimes so the child stays without eating all morning long.

- It is good for my child's education. For the little I know my child has been in two schools in one year, Sharp and Hudson and they are very good.

- I would like the education in Brownsville to be extended to the parents that don't know English (either complete or partial), it would be excellent that the parents could help and assist their children with homework and that way all the burden wouldn't go to the teachers. They should have evening classes for the children with different times and learning levels.

- I feel very proud of the school where my children go. They get very good grades and I have the support of their teachers. First of all we have a great principal that always understands the problems that our youngsters go through in school. She always supports the teachers and they are in agreement with her. We hope as family parents that Victoria Heights stays the same.

- Excuse me that I am not a person prepared to answer these forms because I didn't go to school, but my suggestion is the following: to make a better nation, we all need education. Anyhow, I speak Spanish and some English, a good citizen and a good worker. I am a citizen that wishes the best for this country. Honest to God for this country.

- Generally, my family and me have very good comments about our school district.
- I think that the students should use the "lockers" so they won't have to carry books and run risks of back or physical aches. The "lockers" could be transparent and the office would have a copy of the code in case of emergency, or the permission of the student to "check" their locker. My daughter complains about backaches and the worries of getting one. Because some high schools use them and others don't.
- Not all the schools in Brownsville, Texas are all that good. Therefore, they need to better their establishments and teachers.
- My son is big, in shape and he needs the help of an adult. I think that in his physical education period, there are not enough personnel that can help him. My child always complains and this year I am going to go see the coach.
- I like the BISD services very much. I think it helps the students a lot, but I think that the BISD can help the students that are not U.S. residents to become residents, as long as they continue to be good students.
- In regards to the school district, everything is going fine. The child has two years and it's going fine, the child was in Houston before.
- To whom it may concern, I hereby say thank you for giving me the right to my comments, which are the following: the school has its pros and cons. I think there is the need for more security in regards to the exit and entrance time. Thank you.
- The education that is provided in this district is very good.
- There is the need of more safety in the schools. Due to the lack of safety, especially in high schools, where boys/girls get out easily during lunch.
- The Resaca Elementary works good with the children. Their jobs are great; they worry for the safety of their students. If they miss class, for any reason, they come to our home to ask why they missed. Their time in the cafeteria, in classrooms or PE are great.
- There are some points in favor and others against. In regards to safety and protection to the student before and after they exit from school, the district police is totally inept. When they should be taking care around schools where students fight all the time, they are worrying more on how they look in their patrol cars.
- 1. Prohibit the entrance of animals to the school such as dogs for the student's safety. 2. The nurse should be more responsible in regards to the administration of medicine. 3. At the parent's meetings, we need the opportunity to manifest our agreements and disagreements.
- The secondary level students need some time to talk with the counselor to be able to choose a degree or job in the future. They

might study the class material but they don't know what career it will be of benefit for.

- I think that the education in Brownsville is good and that the teachers are well skilled in order to have control of the children. This is my comment in reference to the education in Brownsville.
- As suggestions, I would say that in the middle schools there should be more security guards so that they check backpacks for drugs so there would be no more gangs and vandalism. I don't have children in these schools, but I know some that do and their children have problems because of drugs and vandalism.
- Me, as many other mothers, the only thing we do not agree with is that the teachers ask for too many school supplies from children. They have to be prepared with their supplies but the teachers ask for them twice. Twice for crayons, one size and another size, two glue bottles, Kleenex boxes etc. etc. Many times the teachers don't let them bring the supplies home because they take it away from the children, but if they send homework where they have to use crayons of glue they don't have what they need. My daughter says that the teacher asks them for the Kleenex. If there are 20 students in a classroom and they ask them for two boxes that would be 40 in total. I think everyone of the children should keep their school supplies. Also, Ziplocs of one size and another one are not necessary. Thank you for your attention, as parents we need to be heard.
- There is good education and I hope they can get better at it.
- BISD needs better-qualified teachers that can identify problems with a child's learning ability and teachers that can communicate with parents in a better way.
- With the new bilingual system implanted three years ago, the children learned to read and to add very quickly. Because of the language problem they couldn't understand the instructions.
- The Brownsville, Texas school district has many fundamental programs for learning for the children. I hope they continue after the education of our children and if we could cooperate, since we are parents and it's our responsibility first, we will do it gladly. Because, thanks to you, our children would have a better future tomorrow. Thank you teachers.
- All the questions were evaluated in a concrete way and sometimes they were good questions. In regards to the bus, we would like to have a fixed hour because sometimes it comes at 7:25 a.m. or until 8:00 a.m.. I would like to know that there's something stable because we wait too long at the stops. In respect to other things, everything is well organized. One thing, if we help everyday it would be excellent.
- It is good what they do and that they share our opinions and that they care about our children's education so that in the future they

will get ahead, everything is well organized, continue fighting for education.

- Pay more attention when the children go to the bathroom because they just go to play and to write bad words in the walls and doors, also pay more attention to the children in general, they are making little riots in the hallways and they don't get their attention. Take into account this suggestion because when there's a meeting at school I am going to take the word and speak in front of all the parents. Thank you

- Just a concerned mother worried for the goodwill and education of children in general. The students don't pay attention because if there weren't teachers the students would be ignorant. They should respect their teachers.

- There is good education in Brownsville, thanks for taking care of the education of our children.

- No comments, everything is fine.

- My son is in school and my daughter will just start this year. My son is handicapped and so far they have treated him good. At this time, I don't have anything I dislike from the school. I hope they continue the same. Thank you

- I only have to say, that the school is good, I am very happy with the school as well as with the teachers who treat my children very good. They teach them much, my children got ahead even more this year, and I as parent had a lot of communication with my children's teachers and with the school principal and the staff. They all were nice to my children and I am very thankful to God and with all the people that work in this school (Dr. Gallegos Elementary)

- At this time, everything is fine in the school district. There haven't been any problems for my children and me, but I would like you to check your 6th through 8th grade teachers because sometimes they come with references. Thank you.

- Well, I think that the education is good but sometimes the students do fail. They don't do their part since what they need to study is brought to them; I think they are the ones responsible for their education.

- In general terms everything is working fine.

- No comments since I agree with school.

- Up until this time, I have been lucky that my children are in good hands, the schools where they have been (Gonzalez and Martin) as well as their teachers have been excellent and that has reflected in the big advancement that my children have had. Thank you.

- From my behalf, I am happy with all the school district regulations and don't have any complaint nor any comments. Thank you.

- To some questions my answer were "no opinion" because I am not aware since they are of financial matters or unknown. I am the

mother of two students; I worry for their good education and the goodwill of my daughters.

- I agree with the functions and the way the school operates.
- One of the biggest problems in the school system is that you give the students too much liberty, and that makes them not take responsibility in learning, and they take everything as a game. The school system needs to find ways and laws to control this organization, so that the good students continue with their education. We hope you consider our opinion.
- The only thing I can comment on is the food. I will like to see you serve better food. Not only pizza and Chicken Nuggets.
- In the way I view things, like a concerned mother that I am, and as a participant in the education of my children, the school district works very hard to offer good service to the kids. Their doors are always open to the public.
- We need more security around the school, for example the Police need to patrol the school area more often.
- Everything at the school is excellent.
- The teachers need to discipline the kids more.
- I think this survey is very good, and I also agree with the computer class they start the kids with at Kindergarten.
- The schools have good teachers, and I am glad that my children have learned to study, thanks to the teachers.
- Well, I respect the school education, I think it is good, don't know what else to say but that my kids are very happy to be in school.
- These surveys are very good. I am very pleased with the school my children are attending.
- From a Mother's views, the school program is good.
- The only thing I can say is that I am happy that you are interested in our opinion.
- My opinion is that I see that we have very good teachers, and they give our children the attention that they need.
- The education that my children are getting is very good; I am very satisfied with your teaching.
- We agree with the education at the school, it's a very good education, we are happy with it.
- Thanks for this survey, and also for taking into consideration our opinion, so that in the future our children grow up to be professionals and they can serve their country.
- They should inform the parents about the teaching system more often, my child has three years in the bilingual program and still have not learned English, now he is going to the 5th grade and they tell me that I could change him to a different program, why that information was not told to me before. A very important point is that they need to have more respect between teachers and students.

- Thanks for sending the survey, I don't know much about BISD because I only have two years that my children are attending this school, but for the little that I can see, the teachers and parents work very hard for the children's education.
- We will like to thank you for taking in consideration our opinion in the survey. I am very happy with the teachers and directors at the school.
- I am very pleased and happy with the education my child is getting. I also like that when he does not do his work the teacher calls me at home to inform me. I try to work very closed with the teachers at my child's school.
- I think that the Bilingual education is very important for this district, but they need more teachers who speak more Spanish. My child was in Pre-K and Kindergarten and his teachers did not speak good Spanish.