

*oppaga*

# Performance Review



August 2000

Report No. 00-05

## Hamilton School District Saves \$550,312 by Implementing Review Recommendations

### *at a glance*

The 1996 Legislature funded a performance review of the Hamilton County School District. A private consulting firm that had been selected competitively, MGT of America, Inc., conducted the review in 1997 under contract with OPPAGA.

As of March 2000, the Hamilton County School District has implemented or is in the process of implementing 55% of the performance review recommendations. As a result, the district reports that it has saved \$550,312 to date, with additional savings likely to accrue as the district continues to implement these recommendations.

District administrators provided several reasons why the school district has chosen not to implement the remaining 45% of the recommendations. These include other district priorities and perceived undesirable effects of some recommendations. According to the consultant's report, the district could save an additional \$2.6 million over a five-year period by implementing the remaining recommendations.

### Background

This report provides the Florida Legislature with information on the status of the School District Performance Review Program conducted by private consultants under contract with the Office of Program Policy Analysis and Government Accountability (OPPAGA). The 1999 Legislature directed OPPAGA to conduct post-review evaluations of the school districts that underwent performance reviews during Fiscal Year 1996-97. Our evaluation examines the performance review recommendations that the district has implemented and the cost savings it has realized from these improvements. We also examined reasons why the district has not implemented the remaining recommendations.<sup>1</sup>

### *Performance reviews identify ways school districts can improve and save funds*

The 1996 Legislature created the School District Performance Review Program to assist Florida school districts in identifying ways to save funds, improve management, and increase efficiency and effectiveness.

<sup>1</sup> OPPAGA conducted this status report with assistance from MGT of America, Inc., which conducted the initial performance review.

## Performance Review

School districts that undergo performance reviews are either designated in the General Appropriations Act or selected by OPPAGA. Since 1996, nine school districts have participated in the School District Performance Review Program.<sup>2</sup> Participating districts retain any cost savings resulting from implementing review recommendations. However, the law does not require school districts to implement recommendations. In 1996, the Legislature appropriated funding for a performance review of the Hamilton County School District.

Pursuant to Florida law, the performance review examined 11 broad school district management and operational areas. These areas are presented in Exhibit 1. OPPAGA worked with school district officials to finalize the scope for each area and to tailor the reviews to the districts' needs.

### Exhibit 1

#### Performance Review Examined 11 Areas

1. School district organization and management
2. Educational service delivery
3. Community involvement
4. Facilities use and management
5. Personnel management
6. Asset and risk management
7. Financial management
8. Purchasing
9. Transportation
10. Food service
11. Safety and security

Source: Section 11.515, F.S.

OPPAGA used a formal request for proposal process to select a private consulting firm, MGT of America, Inc., to conduct the review. OPPAGA monitored the contract to ensure the firm examined each area and that the final report was useful to the school district. This monitoring included attending key meetings between consultants and school district officials and reviewing report drafts to ensure the findings were soundly presented, clearly and

<sup>2</sup> The nine districts are Hillsborough, Lee, Hamilton, Glades, Clay, Orange, Broward, Martin, and Brevard. OPPAGA will release progress reports on the Hillsborough, Lee, and Hamilton districts this year.

credibly communicated, and provided needed context.

### *The Hamilton performance review projected approximately \$3.6 million in cost savings*

The review of the Hamilton County School District documented major problems and barriers facing the district and proposed 95 recommendations for addressing the district's current and long-range problems. The report included implementation strategies, recommended timelines, and fiscal impacts for each recommendation. The consulting firm's report estimated that the district could save \$3,590,376 over five years by implementing its recommendations (see Exhibit 2). Thirty-nine of 95 (41%) had fiscal implications.

### Exhibit 2

#### The Report Projected Approximately \$3.6 Million in Savings Over Five Years

Year Savings Begin	Total
Year 1-Initial annual savings	\$ 434,648
Year 2-Annual net savings	730,604
Year 3-Annual net saving	745,794
Year 4-Annual net savings	831,744
Year 5-Annual net savings	840,094
One-Time (Cost) Savings	7,492
<b>Total Savings Projected for Five Years</b>	<b>\$3,590,376</b>

Source: Performance review final reports.

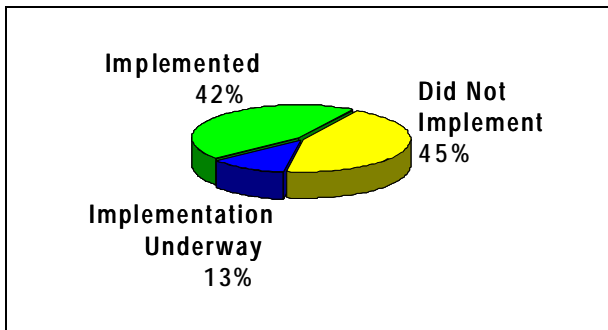
**Follow-up process.** OPPAGA evaluated the implementation status of recommendations as of March 2000. We based our conclusions on a review of a district-completed assessment, discussions with district staff, and documentation inspected during the course of the evaluation.

### *Hamilton is addressing 55% of report recommendations*

Since May 1997, the Hamilton County School District has implemented 42% (40 of 95) of the recommendations and is in the process of addressing an additional 13% (see Exhibit 3). This includes district actions that varied slightly

from the recommended action, but generally addressed the problem described in the report. Further, several of the recommendations implemented by the district produced major change. The district has implemented nearly half (9 of 20) of the recommendations that the report projected would have major impact. These recommendations either were expected to have a substantial fiscal impact, required major organizational or staffing changes, or significantly improved services or resources for students.

**Exhibit 3  
Hamilton County School District Implemented or Is Implementing 55% of the Recommendations**



Source: OPPAGA analysis of information provided by Hamilton County School District.

The recommendations that the district is still in the process of implementing include adjusting teacher workloads and increasing some class sizes by shifting staff to accommodate growth. Implementation of these recommendations would result in an increase of one student per teacher in grades 4 through 12. In addition, the district is implementing recommendations to develop a series of manuals to guide district and school-level procedures, develop and use curriculum guides, establish a system to periodically evaluate all programs, and update job descriptions.

**Overall, the district estimates saving \$550,312**

The Hamilton County School District estimates that it has already saved \$550,312 by implementing the specific recommendations or addressing the problems described in the report

in a different manner. These reported cost savings represent approximately 15% of the \$3,590,376 total five-year savings that the consultant projected could be attained if all recommendations were implemented.

For example, some of the cost savings the district reports so far are listed below.<sup>3</sup>

- The district saved \$475,000 to date, due to the elimination of 14 staff positions, such as maintenance workers, clerical staff, and paraprofessionals.
- The district saved \$56,000 to date by implementing a recommendation to reduce the total travel budget by freezing all travel, except for travel specifically paid for by grants, and approving out-of-county travel on an exception basis.
- In addition, the district implemented six recommendations that the consultant anticipated would have had fiscal implications, but for which district administrators were unable to reliably and accurately determine a cost savings. The consultant projected the five-year cost savings for these recommendations to be \$239,700.

***The district chose not to implement recommendations projected to save an additional \$2.6 million***

Hamilton County School District has chosen not to implement the 43 remaining recommendations that the consultant projected could have saved the district an additional \$2,615,422 over five years. Over one-half of those recommendations not implemented were in the areas of Food Service, Transportation, Technology, and Facilities. For more information on the implementation status of all report recommendations, refer to Appendix A.

<sup>3</sup> The Hamilton, Hillsborough, and Lee county school districts had difficulty estimating fiscal impacts. District staff provided estimates of cost savings but had limited documentation to clearly substantiate their estimates. Therefore, OPPAGA verified reported cost savings based on the availability of limited documentation and interviews of district staff. State law does not require that districts implement performance review recommendations or track cost savings associated with their implementation.

## Performance Review

The district offered several reasons for choosing not to implement report recommendations. For instance, other district activities took priority over the district's implementation of six recommendations by the assistant superintendent. District administrators asserted that the performance review assigned this person responsibility for implementing too many recommendations and that these responsibilities could not be readily delegated to other positions. For example, the district chose not to implement a recommendation to develop and implement a minority recruitment plan, stating that developing a written plan was less a priority than just trying to fill open positions.

Philosophical differences existed between the consultant and the district regarding the desirability of 10 recommendations. The report projected that the district could have saved an additional \$1,569,805 by implementing these actions. For instance, the district chose not to eliminate the transportation of students for which it receives no transportation funding ("courtesy riders") because of safety concerns for these students.

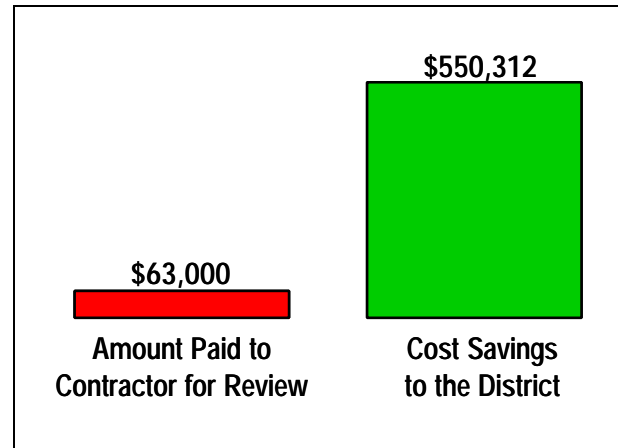
The district asserted that other unimplemented recommendations were not practical (e.g., would be too expensive or create other, unanticipated inefficiencies for the district) or lacked community support. For example, the district chose not to expand its food service operations to offer and charge fees for catering services to the community. District staff indicated that they made this decision due to the cost of additional equipment needed to provide these services and the lack of sustained demand for catering services in a community as small as Hamilton County.

### ***Savings reported by the Hamilton County School District exceeds the state's investment in the review***

The overall savings reported by the Hamilton County School District as a result of implementing recommendations are greater than the cost of the review. As shown in Exhibit 4, the reported net cost savings to date

are nine times greater than the cost of the review.<sup>4</sup>

### **Exhibit 4 Hamilton's Reported Cost Savings Are Greater Than the Amount Paid to the Contractor to Conduct the Review**



Source: OPPAGA analysis of information provided by Hamilton County School District and OPPAGA's records.

### ***Additional observations about school district performance reviews***

The 1997 Legislature directed OPPAGA and the Auditor General to create a separate process for evaluating school district performance (s. 230.23025, *F.S.*). In this effort, OPPAGA and the Auditor General have established Best Financial Management Practices that can be used to assess school district operations. These Best Practices were adopted by the state Commissioner of Education. OPPAGA and the Auditor General jointly examine school district operations to determine whether they are using the Best Financial Management Practices.

Best Financial Management Practice Reviews are designed to encourage school districts to

- use performance and cost-efficiency measures to evaluate programs;
- use appropriate benchmarks based on comparable school districts, government

<sup>4</sup>The consultant was paid \$63,000 to conduct the performance review. This total does not include costs incurred by OPPAGA or the district to participate in the review.

agencies, and industry standards to assess their operations and performance;

- identify potential cost savings through privatization and alternative service delivery; and
- link financial planning and budgeting to district priorities, including student performance.

To date, four Best Financial Management Practice Reviews have been completed, in Manatee, Polk, Martin, and Brevard school districts (the Martin and Brevard reviews used a combined performance review/Best Financial Management Practice review process).

The 2000 Legislature directed OPPAGA to expand the Best Financial Management Practices to include school safety, community involvement, administrative and instructional involvement, administrative and instructional technology, and educational service delivery. The Legislature also considered, but did not pass, bills that would have integrated the school district performance reviews and the Best Financial Management Practice Reviews into a single process. Under these proposals, OPPAGA would have been required to develop best practices for performance review areas not currently included in Best Financial Management Practice reviews. Consultants whose work would have been closely monitored by OPPAGA and the Auditor General would have conducted the studies.

While the consultants would have conducted fieldwork, OPPAGA would have retained the authority to determine whether districts are meeting the best practices, which is needed to ensure statewide consistency.

Combining the two programs would eliminate overlap between the two types of reviews, simplify administration, resolve confusion among school districts about the reviews, and enable all school districts to participate.

## OPPAGA's Home Page Contains More Information

Additional information on the Florida School District Performance Review Program, and OPPAGA's Best Financial Management Practice Reviews of school districts, is provided on the OPPAGA website, The Florida Monitor, at <http://www.oppaga.state.fl.us/>. The site provides information on the status of current and future Performance Reviews and Best Financial Management Practice Reviews of school districts.

## Appendix A

### Status of Recommendations: Hamilton County School District

Appendix A provides OPPAGA’s conclusions on the implementation status of each recommendation as of March 2000. Line 131, General Appropriations Act for 1999-2000 directed OPPAGA to evaluate (1) the recommendations from the performance reviews that have been implemented and (2) the cost savings realized from the performance reviews. If OPPAGA determined that school districts had not implemented specific recommendations, the law required that the districts specify why such recommendations were not implemented.

The district’s report of estimated savings or costs are generally not comparable to the consultant’s five-year projections for two reasons. First, the district’s estimates are through March 2000, which represents slightly over two-and-one-half years of the five-year projections made by the consultant. In addition, the district implemented some recommendations on a schedule different than the schedule proposed by the consultant.

OPPAGA based its conclusions on a review of a district assessment, discussions with district staff, and documentation inspected during the course of the evaluation. “Implemented” and “Implementation Underway” include district actions that vary slightly from the recommended action, but generally address the problem described in the report. In these cases, “OPPAGA Comments” includes an explanation when the modification differs significantly from the original recommendation.

Consultant			OPPAGA	District	
No.	Recommendations	Projected Five-Year Savings or (Cost)	Conclusions of Implementation Status As of March 2000	Estimated Savings or (Cost)	OPPAGA Comments
<b>Chapter 4: School District Organization and Management</b>					
4-1	Return to two regularly scheduled board meetings each month. (p.4-4)		Implemented	(\$6,500)	The district implemented this recommendation and assumed costs for legal fees and secretarial fees.
4-2	Complete a full review and revision of the district’s policy manual. (p.4-6)		Implemented		
4-3	Automate the policy manual to improve its use and accessibility by the board, the staff, and the public. (p.4-6)	\$1,440	Not Implemented	\$0	The district stated that other activities took priority over the implementation of this recommendation.
4-4	Develop a comprehensive districtwide administrative procedures manual and a series of department, school, or office manuals, as appropriate. (p.4-8)		Implementation Underway		
4-5	Reduce clerical support staff by four positions. (p.4-12)	\$569,718	Implemented	\$45,000	
4-6	Develop a districtwide mission statement, strategic goals, objectives, and multi-year plans for achieving the goals and objectives. (p.4-14)		Not Implemented		The district stated that other activities took priority over the implementation of this recommendation.
<b>Chapter 5: Educational Service Delivery</b>					
5-1	Adjust teacher workloads and class sizes to reduce the number of instructional personnel needed to effectively deliver instruction. (p.5-6)	\$983,216	Implementation Underway	Unable to Determine	Cost savings to be determined once fully implemented.



Consultant		OPPAGA	District		
No.	Recommendations	Projected Five-Year Savings or (Cost)	Conclusions of Implementation Status	Estimated Savings or (Cost)	OPPAGA Comments
			As of March 2000		
5-2	Move the fifth grade classes now held at the middle school to Central Elementary School and make long-range plans to have all sixth, seventh, and eighth grade students in a middle school. (p.5-7)		Implemented		The district moved the fifth grade to Central Elementary School. However, due to lack of community support, the district has no long-range plans to move to the middle school concept.
5-3	Consolidate responsibility for districtwide curriculum coordination and for coordination of the Title I Programs under one administrator and for assessment and evaluation of district programs under another administrator. (p.5-10)	\$279,180	Not Implemented	\$0	The district chose not to implement this recommendation because it would require terminating an existing employee.
5-4	Improve the quality of instruction through the development and use of curriculum guides and by requiring periodic evaluation of all programs. (p.5-12)		Implementation Underway		
5-5	Consolidate responsibility for management of all vocational programs under an assistant principal for Occupational Education at the high school. (p.5-14)	\$197,600	Not Implemented	\$0	The district chose not to implement this recommendation because it would require terminating an existing employee.

### Chapter 6: Personnel Management

6-1	Transfer responsibility for maintenance of staff development records to the administrative assistant for Personnel. (p.6-2)		Not Implemented		The district chose not to implement this recommendation because the shift of responsibilities would over burden the administrative assistant for personnel.
6-2	Improve personnel recruitment and selection by developing and implementing a minority recruitment plan and by actively seeking candidates from both Hamilton County and other counties/states to fill vacant positions. (p.6-5)		Not Implemented		The district asserted that it took action to address this recommendation; however, OPPAGA concluded the action did not meet the intent of the recommendation. The district stated that it has implemented several strategies to fill vacant positions. For example, the district now sends vacancy notices to universities and other school districts, which it did only on an inconsistent basis in the past. However, other activities took priority over the implementation and development of a minority recruitment plan.
6-3	Apply some of the savings realized from implementing recommendations in this report to increase teacher salaries. (p.6-7)	(\$798,012)	Implemented	\$0	The district raised salaries 6%, which is more than the 1-3% raises given in the past. However, this money was already budgeted and not considered an additional cost to the district.
6-4	Provide annual bonuses of up to \$2,000 to administrators who identify and effectively implement major cost-saving practices or "re-engineer" existing practices to be significantly more cost-effective. (p.6-8)		Not Implemented		The district chose not to implement this recommendation due to a school board freeze on administrative salaries.
6-5	Update all job descriptions that are not current or complete, and ensure that the revisions include changing roles and responsibilities that may occur as a result of implementing recommendations in this report. (p.6-9)		Implementation Underway		

## Appendix A

Consultant		OPPAGA	District	
No.	Recommendations	Projected Five-Year Savings or (Cost)	Conclusions of Implementation Status As of March 2000	Estimated Savings or (Cost) OPPAGA Comments
6-6	Revise the annual employee appraisal/evaluation forms. (p.6-11)		Implemented	
6-7	Obtain evaluation reports on all staff development activities attended by Hamilton County School District employees and find alternative staff development for sessions that are not effective. (p.6-12)		Not Implemented	The district asserted that it took action to address this recommendation; however, OPPAGA concluded the action did not meet the intent of the recommendation. The district has chosen to continue its practice of requiring employees who attend training provided through its regional consortium to complete a feedback form.
<b>Chapter 7: Community Involvement</b>				
7-1	Develop a central, district-wide community involvement program in the Hamilton County School District, which focuses on increasing business and civic involvement in the district. (p.7-4)		Not Implemented	The district stated that other activities took priority over the implementation of this recommendation.
7-2	Create a Business and Community Advisory Council to foster business and community involvement in the schools. (p.7-4)		Implemented	
7-3	Charge a minimal fee for using the Community Wellness Center. (p.7-6)	\$3,720	Not Implemented	District staff asserted that the district chose not to implement this recommendation because charging a fee would result in fewer persons actually using the facility and would not be worth the time and effort needed to collect and account for small amount of revenue it would raise.
7-4	Amend board policy to allow limited advertising for local businesses at school athletic events and for the publication of the high school yearbook. (p.7-7)	\$15,000	Implemented	Unable to Determine District staff said that they could not provide an accurate, reliable estimate on the amount of revenue generated from implementing this recommendation since it did not track these revenues separately as part of the internal school-level accounting process.
7-5	Establish a districtwide volunteer program in the district to be centrally coordinated by the assistant superintendent (see Recommendation 7-1). (p.7-9)		Not Implemented	The district asserted that it took action to address this recommendation; however, OPPAGA concluded the action did not meet the intent of the recommendation. The district has not established a centrally coordinated districtwide volunteer program, but rather encourages each school to implement its own program.
7-6	Establish a districtwide parent involvement program that focuses on recruiting and involving parents in non-Title I schools. (p.7-12)		Implemented	
7-7	Strengthen the communications function by establishing a media liaison at each school. (p.7-13)		Implemented	



Consultant			OPPAGA	District	
No.	Recommendations	Projected Five-Year Savings or (Cost)	Conclusions of Implementation Status As of March 2000	Estimated Savings or (Cost)	OPPAGA Comments
<b>Chapter 8: Facilities Use and Management</b>					
8-1	Develop a formal process for determining long-term facility needs that includes <ul style="list-style-type: none"> <li>• a physical condition analysis of all facilities to determine the condition of the structure, interior and exterior conditions, and building safety issues;</li> <li>• an assessment of the current and future utilization rates;</li> <li>• the development of educational specifications for facility improvements;</li> <li>• the educational suitability (based on the educational specifications) of current facilities; and</li> <li>• involvement of all stakeholders in the decision making process (board, staff, administration, community). (p.8-5)</li> </ul>	(\$12,000)	Not Implemented	\$0	The district asserted that it took action to address this recommendation; however, OPPAGA concluded the action did not meet the intent of the recommendation. The district did not implement this recommendation since the state already requires the district to conduct a physical survey every five years similar to the process recommended.
8-2	Review the current utilization and possible alternatives to construction (in conjunction with the building condition evaluation recommended in Section 8.1 above) to determine the long-term best use of each facility. (p.8-8)		Implemented		
8-3	Establish a policy on the use of temporary facilities that will provide the criteria for need and establish limits on the total amount of temporary space at a particular facility. (p.8-9)	\$67,500	Not Implemented		The district asserted that it took action to address this recommendation; however, OPPAGA concluded the action did not meet the intent of the recommendation. The district noted that the physical survey addresses this recommendation, and therefore saw no need to adopt a policy as recommended.
8-4	Implement and encourage use of the policy regarding community use of facilities. (p.8-0)	\$50,000	Implemented	Unable to Determine	District staff said that they could not provide an accurate, reliable estimate of the amount of revenue generated from implementing this recommendation since it did not track these revenues separately as part of the internal school-level accounting process.
8-5	Eliminate access to the abandoned White Springs facility and increase efforts to sell or otherwise dispose of the site. (p.8-11)	(\$5,000)	Implemented		The district now leases the facility for a fee of \$1 per year and staff asserted that this lease absolves the district of liability issues, the core issue identified in the performance review.
8-6	Implement generally recognized cost savings measures, particularly when major construction projects are funded. (p.8-13)		Implemented		
8-7	Automate the work order process to provide for a tracking and response system. (p.8-18)	(\$12,000)	Implementation Underway	Unable to Determine	The cost will be determined once fully implemented.
8-8	Implement a preventive maintenance program that provides regularly scheduled reviews and repairs for all areas of facility maintenance. (p.8-19)	\$34,500	Not Implemented	\$0	The district observed that it does not have enough personnel to implement the recommendation.

## Appendix A

Consultant			OPPAGA	District	OPPAGA Comments
No.	Recommendations	Projected Five-Year Savings or (Cost)	Conclusions of Implementation Status As of March 2000	Estimated Savings or (Cost)	
8-9	Schedule one custodian per school during school hours and the remaining staff during after school hours. (p.8-20)	\$68,350	Not Implemented	\$0	The district stated the schools are under the site-based management policy; custodial staffing is up to the principals who generally have been opposed to implementing this recommendation.
8-10	Prepare an annual estimate of need supplies and purchase through the bid process. (p.8-21)	\$30,500	Not Implemented	\$0	The district stated the schools are under the site-based management policy; supply orders are up to the principals, who generally have been opposed to implementing this recommendation.
8-11	Focus future energy efficiency projects at the North Hamilton facility where energy costs are high. (p.8-23)	\$14,700	Implemented	Unable to Determine	District staff said that they could not provide an accurate, reliable estimate of the amount of revenue generated from implementing this recommendation because they could not isolate these savings from the energy cost increases due to the addition of facility space.

### Chapter 9: Asset and Risk Management

9-1	Reestablish the Insurance Advisory Committee to set standards for health insurance. Enhance the membership of the committee by adding community participation including a qualified volunteer in the area of insurance and risk management. (p.9-3)		Implemented		
9-2	Establish a set period of time to re-bid health and life insurance benefits to maximize the board's ability to secure cost-effective benefits for its employees. (p. 9-4)		Implementation Underway		
9-3	Reduce the district's contribution to each employee's health insurance premium by \$600 in total, implemented in \$200 per year increments beginning in 1998-99. (p.9-7)	\$698,400	Not Implemented	\$0	The district stated that until the board can increase salaries by the recommended amount, the board will continue to pay employees cost of insurance.
9-4	Maintain consistency of the Risk Management responsibility and establish the assistant superintendent as the primary administrator. (p.9-13)		Implemented		
9-5	Revise the current job descriptions to reflect the change in responsibilities related to the Risk Management area to provide for accountability. (p.9-14)		Implementation Underway		
9-6	Implement an overhauled maintenance inventory process to include the use of FIFO and a reorganized facility. (p.9-16)		Not Implemented		FIFO is a system of "first-in-first-out" for items maintained in an inventory status. The district explained that other things have taken priority over the implementation of this recommendation.
9-7	Revise the current method of recording inventory on the financial records of the school district. (p.9-17)		Not Implemented		The district believes the recommendation will take additional staff time without significant benefits to the district and other things have taken priority over its implementation.

Consultant		OPPAGA	District	
No.	Recommendations	Projected Five-Year Savings or (Cost)	Conclusions of Implementation Status	Estimated Savings or (Cost)
			As of March 2000	
9-8	Create a PC spreadsheet cashbook to eliminate the manual calculations and handwritten entries. (p.9-19)		Implemented	
9-9	Create a formal electronic cash flow projection document and implement an ongoing cash flow analysis process. (p.9-19)		Implemented	

### Chapter 10: Financial Management

10-1	Increase the span of control of the director of Business Services by having the payroll specialist report directly to the director of Business Services. (p.10-2)		Not Implemented		The director of Business Services has three fiscal assistants reporting to her. The assistant superintendent stated that the responsibility of the payroll specialist is better assigned elsewhere.
10-2	Develop annual measurable goals and objectives in collaboration with a districtwide strategic planning process. (p.10-3)		Not Implemented		The district stated other things have taken priority over the implementation of this recommendation.
10-3	Reduce the total number of school district employees by at least 20 positions. (p.10-6)		Implemented	\$430,000	The consultant did not identify a cost savings for this recommendation; instead it generally referred to a combination of projected five-year savings contained elsewhere in its report. The district chose to report a savings under this recommendation based on the reduction of 12 positions.
10-4	Reduce non-grant funded district travel expenditures by at least 50%. (p.10-7)	\$227,500	Implemented	\$56,000	The district saved \$56,000 to date by implementing this recommendation to freeze all travel, except for travel specifically paid for by grants, and approve out-of-county travel on an exception basis.
10-5	Develop a sick leave bank policy and implement a sick leave bank for employees. (p.10-9)		Implemented		
10-6	Conduct a needs assessment to determine if a cafeteria plan would support the strategic goals of the organization. (p.10-9)		Implementation Underway		

### Chapter 11: Administrative and Instructional Technology

11-1	Transfer responsibilities for Instructional Technology from the coordinator of VTAE to the MIS coordinator. (p.11-3)		Not Implemented		The recommendation will be considered upon the retirement of the coordinator of VTAE (Vocational Technical and Adult Education). The district chose continue to assign responsibility for instructional technology to the vocational and adult education program rather than that of the MIS (Management Information Systems) since the programs are very small.
11-2	Revise the district technology plan to include all administrative functions at both the school and central office levels. (p.11-3)		Not Implemented		The district chose not to revise the plan.

## Appendix A

Consultant			OPPAGA	District	OPPAGA Comments
No.	Recommendations	Projected Five-Year Savings or (Cost)	Conclusions of Implementation Status	Estimated Savings or (Cost)	
		(Cost)	As of March 2000		
11-3	Provide additional training to technology coordinators. (p.11-5)	(\$17,000)	Implemented	\$0	The district incurred no cost for the additional training because such training was already included as part of the district budget.
11-4	Implement the Facilities Management module of the TERMS software package and begin maintaining detailed records of all computer equipment assets in a centralized repository. (p.11-10)		Not Implemented		The district chose not to implement the Facilities Management module of the TERMS (Total Educational Resource Management System). The district stated that normal property records maintain an inventory on computer hardware and software and each school keeps its own inventory of materials under \$500; the district stated this method was sufficient.
11-5	Refrain from purchasing replacement color cartridges for the DeskJet printers. (p.11-11)	\$2,940	Not Implemented	\$0	The district stated there is very little difference in cost and there are very few machines that use color cartridges, which have separate replacement black cartridges.
11-6	Explore opportunities with the PAEC (Panhandle Area Educational Consortium) for receiving maintenance on technology equipment. (p.11-12)		Not Implemented		At the time the district inquired, the PAEC did not have capabilities to provide maintenance services. PAEC stated it is better for districts to contract for these services on their own.
11-7	Create a policy for use of the Internet. (p.11-16)		Implemented		
11-8	Continue plans for providing Internet access and creating a WAN (Wide Area Network). (p.11-17)		Implemented		

### Chapter 12: Purchasing

12-1	Implement the use of the purchasing cards to improve efficiency in processing low-dollar purchases. (p.12-2)		Not Implemented		The district stated it needs invoices for accounts payable. The district also stated it has had problems with staff spending and this recommendation would exacerbate the problem.
12-2	Establish specific procedures with accountability to reduce the processing time of purchase orders to improve the overall efficiency of the operation. (p.12-4)		Implemented		
12-3	Hire a qualified purchasing agent and centralize the purchasing process to establish efficiency and cost savings. (p.12-6)	(\$149,608)	Not Implemented	\$0	The district stated the recommendation is not feasible at this time due to site-based management, and the board will not fill any non-instructional positions.
12-4	Implement specific purchasing procedures that require strict accountability for maximizing cost savings. In addition, change school board policy to require three written vendor estimates for purchases of \$500 to \$9,999. (p.12-8)	\$180,000	Implementation Underway	Unable to Determine	District staff indicated that they could not provide an accurate, reliable estimate of the amount of revenue generated from implementing this recommendation because while the board has adopted the policy as recommended, it must further develop recommended procedures to achieve the cost savings.

Consultant		OPPAGA	District	
No.	Recommendations	Projected Five-Year Savings or (Cost)	Conclusions of Implementation Status As of March 2000	Estimated Savings or (Cost) OPPAGA Comments
<b>Chapter 13: Transportation</b>				
13-1	Take necessary action to maximize state allocation. (p.13-5)		Implemented	
13-2	Fully compensate drivers for hours worked. (p.13-10)	(\$372,520)	Implemented	(\$36,288)
13-3	Monitor and measure performance through the use of performance indicators. (p.13-11)		Not Implemented	The district does not monitor and measure through the performance indicators as the recommendation states. However, the district installed bus cameras and monitors and submits information to DOE and the school board on a monthly basis.
13-4	Take prompt action to implement Department of Education recommendations. (p.13-13)		Not Implemented	The district asserted that the board, due to safety reasons, has chosen not to implement Department of Education recommendations. As a result, the district continues the practice of busing students considered under state guidelines close enough to the school to walk and for whom the district receives no state revenue to transport ("courtesy riders").
13-5	Eliminate courtesy riders. (p.13-16)	\$772,555	Not Implemented	\$0
				The district asserted that the board, due to safety reasons, has chosen to continue the practice of busing students considered under state guidelines close enough to the school to walk and for whom the district receives no state revenue to transport ("courtesy riders").
13-6	Obtain full reimbursement of transportation services provided to outside organizations. (p.13-18)	\$14,072	Implemented	\$0
				The district asserted that it eliminated the use of transportation services to outside organizations with the exception of one organization rather than charging fees. This one organization pays for the cost of the fuel and driver directly, so there is no cost to the district. Thus, it did not realize the cost savings described in the performance review.
13-7	Adopt a transportation rate for field trips equal to a per mile rate plus driver salary. (p.13-19)		Not Implemented	The district stated the school board sees this as a technical issue because it is all board money. The district charges for actual expenses, the cost of the driver and fuel.
13-8	Discontinue driver hourly payment during long periods where services are not required (e.g., overnight trips). (p.13-20)	\$3,690	Implemented	\$0
				The district indicated that this recommendation was based on an isolated incident, which has not occurred again. Thus, the district indicated that no cost savings resulted.
13-9	Discontinue spur routes of distances less than one and one-half miles. (p.13-21)		Not Implemented	The district asserted that the board, due to safety reasons, has chosen to continue the practice of busing students considered under state guidelines close enough to the school to walk and for whom the district receives no state revenue to transport.

## Appendix A

Consultant			OPPAGA	District	
No.	Recommendations	Projected Five-Year Savings or (Cost)	Conclusions of Implementation Status	Estimated Savings or (Cost)	OPPAGA Comments
			As of March 2000		
13-10	Eliminate buses in excess of the 15% spare bus rate. (p.13-23)	\$427,095	Not Implemented	\$0	The district stated they have cut back on number of new buses bought, one bus per year. The old buses that would have gotten rid of in the past are kept and maintained and repaired.
13-11	Locate a buyer for the mistakenly purchased 47-passenger bus. (p.13-24)	\$40,000	Not Implemented	\$0	The district converted the 47-passenger bus and added it to its bus fleet instead of selling it.
13-12	Increase the shop rate to reflect the actual cost of performing vehicle maintenance. (p.13-24)	\$750	Implemented	\$0	The district indicated that there is no net cost savings associated with its implementation of this recommendation since it just improved the accounting procedures to reflect how much these services actually cost.

### Chapter 14: Food Service

14-1	Cut staffing levels at South Elementary School due to declining enrollment. (p.14-6)	\$26,500	Implemented	\$0	The district indicated that it cut staffing, but the savings were offset when state revenue decreased because enrollment declined.
14-2	Employ future food service workers for less than four hours per day. (p.14-8)	\$33,965	Implemented	\$62,100	
14-3	Reduce food costs by 2% per year and decrease portions served. (p.14-9)	\$93,000	Not Implemented	\$0	The district has not attempted to cut food costs by 2%. District staff also cited federal mandates that require it to serve a prescribed number of food items as rationale for not implementing this recommendation. However, the performance review recommends that the district reduce portion sizes, not the number of items served.
14-4	Reduce expenditures on supplies by 5% per year over five years. (p.14-10)	\$32,250	Implemented	Unable to Determine	District staff said that they could not provide an accurate, reliable estimate of the amount of revenue generated from implementing this recommendation.
14-5	Increase awareness of the food services program by printing more colorful menus and broadcasting menus over local radio. (p.14-12)		Implemented		
14-6	Improve the monitoring of the delivery and use of commodities. (p.14-13)		Implementation Underway		
14-7	Establish a uniform policy for cafeteria personnel. (p.14-14)		Not Implemented		The district did not establish a district level policy; the food service director instituted this as a school-based decision so most workers have gone to a white uniform, but it is not required.
14-8	Create a roving substitute position. (p.14-15)	\$30,250	Not Implemented	\$0	The district stated the recommendation was not financially feasible.
14-9	Update the policies and procedures manual. (p.14-16)		Implementation Underway		



Consultant		OPPAGA	District		
No.	Recommendations	Projected Five-Year Savings or (Cost)	Conclusions of Implementation Status	Estimated Savings or (Cost)	OPPAGA Comments
			As of March 2000		
14-10	Monitor the cleaning performed by custodial staff. (p.14-17)		Implemented		
14-11	Initiate and publicize a formalized catering program. (p.14-17)	\$12,500	Not Implemented	\$0	The district chose not to expand its food service operations to offer catering services to the community. District staff indicated that they made this decision due to the cost of additional equipment needed to provide these services and the lack of sustained demand for catering services in a community as small as Hamilton County.
14-12	Establish goals and objectives for a profitable food services operation. (p.14-18)		Implementation Underway		
14-13	Discontinue the use of vending machines until one hour after the last lunch period. (p.14-20)	\$32,500	Not Implemented	\$0	The district chose not to implement this recommendation and acknowledges that the high school continues to be out of compliance with state board rules. However, district staff indicate that the district has plans to restrict vending machine sales as recommended.
14-14	Prohibit students from leaving campus during lunch periods. (p.14-22)	\$28,125	Implemented	Unable to Determine	Although the district has implemented the recommendation, district staff admitted they have not been able to identify the resulting increased revenues as described in the performance review.
14-15	Conduct a survey of parents and students to determine their interest level in the serving of breakfast. (p.14-23)		Not Implemented		The district chose not to implement this recommendation due to a lack of support among school principals.
14-16	Create a third lunch period and add additional chairs and tables. (p.14-24)		Implemented		
14-17	Remodel the high school cafeteria. (p.14-25)	(\$15,000)	Not Implemented	\$0	The district has tentative plans for renovations in summer 2001.

### Chapter 15: Safety and Security

15-1	Evaluate school emergency action plans to ensure all schools are following the same procedures. (p.15-4)		Implemented		
15-2	Instruct students and staff on the importance of wearing eye protection and the situations that require its use. (p.15-5)		Implemented		
15-3	Begin issuing visitor badges for all non-school employees visiting school and central office facilities. (p.15-6)		Not Implemented		The district has not implemented this recommendation. Visitors continue to walk into the central office without a badge.

# The Florida Legislature

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